



Student's name _____ Valpo ID # _____

Student's Tax Filing Status - Tax Year 2020

Did you file or were you required to file a 2020 U.S. Federal Income Tax Return?

Yes

- I have used the IRS Data Retrieval Tool to transfer my 2020 IRS income into my FAFSA and have provided a copy of my **2020 W2(s)**, or if self-employed, a copy of **Schedule C**.
- IRS Data Retrieval Tool was **NOT** used
 - Attached is a signed copy of my **2020 IRS Federal Tax Return Transcript* or Tax Return** along with a copy of my **2020 W2(s)**. If **self-employed**, attached are all **Schedules** from the federal tax return.

No, I had **no earnings** from work

- I have provided/requested the **Verification of Non-Filing Letter ****from the IRS

No, but I had **some earnings** from work. **(Provide/check all that apply):**

- I have attached a copy my 2020 **W2 form(s)**
- I have attached a copy of my 2020 **1099 MISC**
- I have attached all **Schedules** from the tax return

Spouse's Tax Filing Status - Tax Year 2020

Did your spouse file or were they required to file a 2020 U.S. Federal Income Tax Return?

Yes

- The **IRS Data Retrieval Tool** in FAFSA was used to transfer the 2020 IRS income information into the FAFSA and attached are a copy of their **2020 W2(s)**, or if self employed, **Schedule C**.
- IRS Data Retrieval Tool was **NOT** used
 - Attached is a signed copy of their **2020 IRS Federal Tax Return Transcript* or Tax Return** along with a copy of their **2020 W2(s)**. If **self-employed**, attached are all **Schedules** from the federal tax return.

No, my spouse had **no earnings** from work.

- I have provided/requested the **Verification of Non-Filing Letter ****from the IRS

No, but my spouse had **some earnings** from work. **(Provide/check all that apply):**

- Attached is a copy of my spouse's 2020 **W2 forms**
- Attached is a copy of my spouse's 2020 **1099 MISC income**
- I have attached all **Schedules** from the tax return

*A guide for getting your **Tax Return Transcript** is on valpo.edu/student-financial-services under the **FORMS** link. If student and spouse filed separately, a **Federal Tax Return or Tax Return Transcript must be provided for both the student and the spouse.**

If you or your spouse did not file taxes and were not required to file, please send in a **2020 Verification of Non-Filing Letter from IRS.gov. To receive the document you must click on Get Your Tax Record and then click on Get Transcript Online.

Other Income Information - Tax Year 2020

Please report all applicable income information for the student and spouse below for the 2020 tax year. Please indicate \$0 in any field that does not apply.

Student	Income Resources for 2020	Spouse
\$	Child support RECEIVED for all children in 2020. Do not include foster care or adoption payments.	\$
\$	Untaxed Income <ul style="list-style-type: none"> • Workers compensation • Disability benefits • Untaxed foreign income • The untaxed portions of health savings accounts (IRS Form 1040 Schedule 1 — line 12) 	\$
\$	Housing, food and other living allowance paid to you/spouse: (select all that apply): <input type="checkbox"/> Clergy <input type="checkbox"/> Military (including cash payments and cash value of benefits). Do not include value of on-base housing or basic military allowance/parsonage value.	\$
\$	Veteran's Non-Educational Benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational work-study allowances.	\$
\$	Welfare/TANF/SNAP/Food Stamps	\$
\$	Taxable Income from: Federal Work Study, Co-Op Earnings, Fellowships, Combat Pay, AmeriCorps benefits, grants/scholarships over tuition, fees, books (circle those that apply.)	\$
\$	Money Received or paid on your behalf (e.g. bills) by a person not reported on this form. Do include distributions to the student from a 529 plan that is owned by someone other than you or your parents (such as grandparents, aunts, and uncles. (You must include these distribution amounts.) Do not include Social Security benefits.	\$
<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	IRA/Pension distributions: If you have a difference between lines 4a minus 4b OR 4c minus 4d from the IRS form 1040, was this amount a rollover?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

Certification and Signatures

I certify that all the information reported on this worksheet is complete and correct.

Electronic signatures are not accepted.

Student Signature _____ Date _____

Return completed forms to: Office of Financial Aid - Kretzmann Hall, Valparaiso University
 1700 Chapel Drive, Valparaiso IN 46383
 Fax: 219-464-5012 Phone: 219-464-5015 Email: finaid@valpo.edu