

SAINT LOUIS UNIVERSITY™

STUDENT FINANCIAL SERVICES

One Grand Blvd.

DuBourg Hall, Room 121

Saint Louis, MO 63103

Phone: 314-977-2350

Fax: 314-977-3437

Email: SFS@SLU.edu

2017-2018 Verification Worksheet

Student's Name _____ SLU Banner ID Number _____

Your student aid application was selected for review by the U.S. Department of Education. Saint Louis University is required by federal law to compare your application with information on this worksheet and with your 2015 federal tax documents. This includes spouse's information if married and parents' information if you are considered dependent for federal aid purposes.

Once verification is complete, necessary corrections will be submitted to the Central Processing System and you will receive an amended Student Aid Report (SAR) including required adjustments to your Expected Family Contribution (EFC). You may review changes to your offered awards on mySLU.

Saint Louis University recommends completion of the verification process by June 30, 2017. Completing the process after this date, may result in you not being considered for Saint Louis University competitive scholarships and other aid opportunities including Federal SEOG and Federal Perkins loans. You may also be required to make payments towards your account balance until your aid eligibility can be determined.

The final deadline to complete the verification process is established by the Federal government and published in the Federal Register on an annual basis – www.federalregister.gov/.

A. Family Information

List the name and age of all household members (as defined below). Also include the name of the college for household members, excluding your parent(s), who will be enrolled, at least half time, in a degree, diploma, or certificate program at a post-secondary educational institution any time between July 1, 2017 and June 30, 2018.

Dependent Student:

- Yourself
- Your parent(s), including step-parent (if applicable). Do not include your non-custodial parent.
- Your parent(s)' other dependent children if your parent(s) will provide more than half of their support from July 1, 2017 through June 30, 2018.
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2017 through June 30, 2018.

Independent Student:

- Yourself
- Your spouse (if applicable)
- Your children, if you will provide more than half of their support from July 1, 2017 through June 30, 2018.
- Other people only if they now live with you and you will provide more than half of their support from July 1, 2017 through June 30, 2018.

Full Name	Age	Relationship to Student	Attending College	Name of the College <small>If enrolled at least half-time during 2017-18.</small>
		Self	<input type="checkbox"/> Yes <input type="checkbox"/> No	Saint Louis University
		<input type="checkbox"/> Parent 1/Parent 2		Do Not Use
		<input type="checkbox"/> Parent 1/Parent 2		Do Not Use
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

If more space is needed to provide information requested, please provide a separate page that includes the student's name and ID number at the top.

B. Student/Spouse Tax Filing Status

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you or your spouse file, or will you file, a 2015 Federal IRS Tax Return?
If Yes...	If you or your spouse (if married) filed or will file a 2015 Tax Return, a copy of your 2015 Federal Tax Return Transcript OR Signed 2015 Federal Tax Return is required. (See attached instructions for additional information)

If No... (If Section Below Left Blank & Non Tax Filer – Will Be Returned)

Were you (the student) employed at any time during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Was your spouse employed at any time during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I am not married

If you, or your spouse, were employed in 2015 and did not file a tax return, list the income received from all employers (even if no W-2 was issued). **Please attach copies of all W-2's. If No earned income, indicate you and/or your spouse's name; and \$0 earned income in the table below.**

Name of Non-Filer	Employer or Source of Income	2015 Income	W-2 Attached
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

I/we certify that I/we did not and were not required to file a 2015 Federal income tax return (or foreign tax return) and that all of the information reported is complete and accurate. **WARNING:** If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

Student's Signature	Date	Spouse's Signature	Date
---------------------	------	--------------------	------

NOTE: Signatures must be handwritten. Computer fonts not acceptable

C. Parent/Step-Parent Tax Filing Status (if Applicable)

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did your parent(s), including your step-parent (if applicable) file, or will they file, a 2015 Federal IRS Tax Return?
If Yes...	If your parent(s), including your step-parent (if applicable), filed or will file a 2015 Tax Return, a copy of your 2015 Federal Tax Return Transcript OR Signed 2015 Federal Tax Return is required. (See attached instructions for additional information)

If No... (If Section Below Left Blank & Non Tax Filer – Will Be Returned)

Were you (the parents) employed at any time during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No
--	--

If you (the parents) were employed in 2015 and did not file a tax return, list the income received from all employers (even if no W-2 was issued). **Please attach copies of all W-2's. If No earned income, indicate your parent(s) name; and \$0 earned income in the table below.**

Name of Non-Filer	Employer or Source of Income	2015 Income	W-2 Attached
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

I/we certify that I/we did not and were not required to file a 2015 Federal income tax return (or foreign tax return) and that all of the information reported is complete and accurate. **WARNING:** If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

Parent's Signature	Date	Parent/Step-Parent's Signature	Date
--------------------	------	--------------------------------	------

NOTE: Signatures must be handwritten. Computer fonts not acceptable

Sign and Date This Worksheet

By signing, I certify that all of the information reported and/or attached is complete and correct. **WARNING:** If you purposely provide misleading information or withhold information, you may be subject to penalty of law and/or institutional sanctions.

Student Signature	Date	Parent Signature (If Applicable)	Date
-------------------	------	----------------------------------	------

NOTE: Signatures must be handwritten. Computer fonts not acceptable

D. Submit Documents

Saint Louis University
 One Grand Boulevard
 DuBourg Hall, Room 121
 St. Louis, MO 63103
 Fax: (314) 977-3437 Email: sfs@slu.edu

Please make sure all forms and documents are signed and include your SLU Banner ID number.

Instructions for Obtaining 2015 IRS Tax Return Information

FAFSA IRS Data Retrieval Tool ★ Unavailable ★

As of March 2017, The Internal Revenue Service (IRS) & U.S. Department of Education, Office of Federal Student Aid indicated that the IRS Data Retrieval Tool (DRT) will be unavailable for the remainder of the 2017-2018 financial aid award year. We encourage you to follow the steps below to obtain the necessary documentation in lieu of this situation. Please see joint statement [here](#) for more information.

Options for Getting Your IRS Tax Return Transcript

Online Request

- Go to www.irs.gov
- Under the **Tools heading** on the IRS homepage, select "Get Transcript of Your Tax Records."
- Select "Get Transcript by MAIL."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Telephone Request - 1-800-908-9946

Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

Options for Providing Your IRS Tax Return

- Scan/ Print or e-mail a **PDF Copy** of your 2015 IRS Federal Tax Return.
 - Provide a "wet" signature on the signature line **OR**;
 - the signed, stamped, typed, or printed **Name**;
 - **Address** of the preparer of the income tax return; and
 - the **preparer's Social Security Number, Employer Identification Number, or Preparer Tax Identification Number.**

Note: Do not mail your original copy of your IRS Federal Tax Return

Tax Filers with Special Circumstances

Individuals Granted a Filing Extension by the IRS - Provide the following documents:

- A copy of IRS Form 4868 that was filed with the IRS for the tax year;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension (if applicable);
- A copy of the IRS's Verification of nonfiling dated on or after October 1, 2016; **and**
- A copy of W-2 forms for **each** source of employment income received for the tax year. If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the tax year.

Individuals Who Filed an Amended IRS Income Tax Return - Provide a copy of the original IRS tax return transcript **and** a signed copy of IRS Form 1040X.

Individuals Who Were Victims of Tax Administration Identity Theft - Call the IRS at 1-800-908-4490. In addition, you must provide a signed statement indicating that you were a victim of tax-related identity theft (Form 1e).

Individuals Who Filed Non-US Income Tax Returns - A transcript obtained, at no cost, from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for the tax year. If the transcript cannot be obtained at no cost, a signed copy of the applicable tax return(s).