2019-2020 Verification Worksheet - Dependent

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 2017 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 Student Portal.

Saint Louis University recommends completion of the verification process by June 30, 2019. 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, 2019 and June 30, 2020.

Dependent Student:

• Yourself
• Your parent(s) (including step-parent) even if you do not live with your parent(s). Do not include your non-custodial parent.
• Your parents’ other dependent children if your parent(s) will provide more than half of their support from July 1, 2019 through June 30, 2020, or if the other children would be required to provide parental information if completing a FAFSA for 2019-2020 – even if they do not live with your parents.
• Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support through June 30, 2020.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship to Student</th>
<th>Attending College</th>
<th>Name of the College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td></td>
<td>□ Yes □ No</td>
<td></td>
<td>Saint Louis University</td>
</tr>
<tr>
<td>□ Parent 1/Parent 2</td>
<td></td>
<td>□ Yes □ No</td>
<td></td>
<td>Do Not Use</td>
</tr>
<tr>
<td>□ Parent 1/Parent 2</td>
<td></td>
<td>□ Yes □ No</td>
<td></td>
<td>Do Not Use</td>
</tr>
<tr>
<td>□ Yes □ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Yes □ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Yes □ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

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 __________________________ Date ______________

NOTE: Signatures must be handwritten. Computer fonts not acceptable
Please indicate below which process has been completed:

<table>
<thead>
<tr>
<th>Student</th>
<th>Parent</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1: IRS Data Retrieval Process when completing the FAFSA (Section B or Section C – Not Required)</td>
<td></td>
</tr>
<tr>
<td>#2: Enclosed a tax transcript from the IRS (See Attached Instructions Below, Pages 3) (Section B or Section C – Not Required) (Copies of 1040 Federal Tax Return is no longer acceptable documentation)</td>
<td></td>
</tr>
<tr>
<td>#3: Will not file a 2017 Federal Tax Return – Complete Non-Filer(s) Section BELOW and attach W-2 form(s)</td>
<td></td>
</tr>
</tbody>
</table>

B. Student Non-Filers

<table>
<thead>
<tr>
<th>Dependent Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Were you (the student) employed at any time during 2017?</td>
</tr>
</tbody>
</table>

If you were employed in 2017 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-2s received. Dependent students are not required to provide verification of Non-Filing status.

<table>
<thead>
<tr>
<th>Name of Non-Filer</th>
<th>Employer or Source of Income</th>
<th>2017 Income</th>
<th>W-2 Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

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.

I certify that I did not and was not required to file a 2017 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.

**NOTE:** Signatures must be handwritten. Computer fonts not acceptable

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C. Parent/Step-Parent Non-Filers (if Applicable)

| Were you (the parents) employed at any time during 2017? | □ Yes  □ No |

If you (the parents) were employed in 2017 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. **YOU MUST ALSO PROVIDE VERIFICATION OF NON-FILING STATUS.** Instructions are available below or on the IRS website at: [https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them](https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them).

<table>
<thead>
<tr>
<th>Name of Non-Filer</th>
<th>Employer or Source of Income</th>
<th>2017 Income</th>
<th>W-2 Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

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.

I/we certify that I/we did not and were not required to file a 2017 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.

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**NOTE:** Signatures must be handwritten. Computer fonts not acceptable

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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.

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Submit Documents

Saint Louis University
One Grand Boulevard
DuBourg Hall, Room 119
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 2017 IRS Tax Information

Information Included Below is for Information Purposes Only – Need Not Be Submitted with Pages Above to Student Financial Services

FAFSA IRS Data Retrieval Tool ★ Recommended ★

The most efficient way to provide your IRS tax information is by using the IRS Data Retrieval Tool (DRT) within your FAFSA application.

In most cases, no further income verification documentation is required when using this tool as long as the information is unchanged.

Go to www.fafsa.gov and select Login.
Select “Make FAFSA Corrections”
Select the Financial Information tab and follow the instructions provided. Be sure to enter your address exactly as it appears on your Federal 1040.
Once the IRS data transfer is complete, electronically SIGN and SUBMIT your FAFSA.

IMPORTANT: If you use the Data Retrieval Tool to link your tax information, please do not submit paper copies of Tax Return Transcripts unless requested by the Financial Aid Office.

2017 IRS Tax Filer & Don’t Want to Use the Data Retrieval Tool?

If you are unable to use the Data Retrieval Tool, or you choose not to, you must submit a paper copy of all required Tax Return Transcript(s). www.IRS.gov

Options for Getting Your IRS Tax Return Transcript


Current IRS Users – Online Request: (Only if you have created an online account previously)

• Go to www.IRS.gov
• Under the table on the IRS homepage, select "Get Your Tax Record".
• Select “Get Transcript by Mail”. Then, Follow on-screen prompts.
• Ensure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.”

New IRS Users – Online Request to Receive via U.S. Mail: (If 1st Time User to IRS Account)

• Go to www.IRS.gov
• Under the table on the IRS homepage, select "Get Your Tax Record".
• Select “Get Transcript by Mail”. Then, Follow on-screen prompts.
• Ensure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.”

Telephone Request: 1-800-908-9946 & Request 2017 IRS Tax Return Transcript

• Your IRS Tax Return Transcript is mailed to the address used to file your 2017 Federal Tax Return; Typically Received in 7-10 business days.
• Then, send a copy to Student Financial Services (See Section D Above)
**Tax Filers with Special Circumstances**

**Individuals Granted a Filing Extension by the IRS** - Provide the following documents:
- A copy of IRS Form 4868 “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” the individual filed with the IRS for tax year 2017;
- A copy of the IRS’s approval of an extension beyond the automatic six-month extension for tax year 2017;
- Confirmation of non-filing from the IRS dated on or after October 1, 2018 (See Instructions for Verification of Non-Tax Filing Status Below).
- A copy of IRS Form W–2(s) for each source of 2017 employment income received or an equivalent document; and
- If self-employed, a signed statement certifying the amount of AGI and U.S. income tax paid for tax year 2017.

**Individuals Who Filed an Amended IRS Income Tax Return** - Provide a copy of the original IRS tax return transcript (If IRS DRT not used) and a signed copy of the 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. Please contact Student Financial Services for more information & guidance.

**Individuals Who Filed Non-U.S. 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 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).

**Non-Tax Filer & Verification of Non-Tax Filing Status**

**Telephone Request:** Call 1-800-908-9946 & Request Verification of 2017 Non- Tax Filing Status
- A letter is mailed to your address verifying your request, typically within 7-10 business days.
- Then, send a copy of all pages included to Student Financial Services.

**Paper Request:** Complete the IRS Form - 4506-T. Then, mail all requested information to the IRS.
- A letter is mailed to your address verifying your request. See #7 on 4506-T Form “Verification of Non Filing” (Note: Approximate Processing Time = 10 business days upon receipt of 4506-T at IRS).
- Then, send a copy of all pages included to Student Financial Services.

### 2017 FEDERAL INCOME TAX FILING REQUIREMENTS

<table>
<thead>
<tr>
<th>Tax filing requirements may be found in the IRS Form 1040 instruction book.</th>
<th>For most people, a tax return must be filed with the IRS if their 2017 income was at least:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single dependent student (someone else can claim you)</td>
<td>$6,350 Earned Income</td>
</tr>
<tr>
<td>Married - filing separately</td>
<td>$4,050 Gross Income</td>
</tr>
<tr>
<td>Single, if claiming self</td>
<td>$10,400 Gross Income</td>
</tr>
<tr>
<td>Head of household</td>
<td>$13,400 Gross Income</td>
</tr>
<tr>
<td>Married – filing joint return</td>
<td>$20,800 Gross Income</td>
</tr>
<tr>
<td>Qualifying widow(er) with dependent</td>
<td>$16,750 Gross Income</td>
</tr>
</tbody>
</table>

The amounts listed are for individuals under the age of 65.