

Section B. – Student (and Spouse) Tax Form and Income Information

If you are married as of the date you completed the FAFSA, regulations require us to obtain your Spouse’s Income and Tax information for 2021 (even if you were not married in 2021).

Check One:	If Student (and Spouse):	Submit Requested Info and Documents:						
<input type="checkbox"/>	No Income in 2021 and did not file a 2021 Tax Return	By selecting this option, you are verifying that the student (and spouse) had zero wages/income in 2021						
<input type="checkbox"/>	Earned wages/income in 2021 but did not file a 2021 Tax Return	<ol style="list-style-type: none"> Submit copies of Student’s (and Spouse’s) 2021 W-2’s or a Wage and Income Transcript from IRS If no W-2’s were provided, List Source and Amount earned from Student’s (and Spouse’s) work: <table style="margin-left: 40px; border: none;"> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> </tr> </table> Submit IRS Non-Tax Filer Letter or Park U Statement of Non-Tax Filing Form for Student (and Spouse) 	_____	\$ _____	_____	\$ _____	_____	\$ _____
_____	\$ _____							
_____	\$ _____							
_____	\$ _____							
<input type="checkbox"/>	Filed a 2021 Foreign Tax Return or had foreign income in 2021	<ol style="list-style-type: none"> Submit an English translation of the foreign tax forms. If Student filed a Puerto Rican tax return, provide signed copy of Student’s (and Spouse’s) 2021 Individual Income tax return (does not need to be translated) 						
<input type="checkbox"/>	Filed a 2021 Amended Tax Return <i>and</i> Did NOT use the IRS Data Retrieval Tool on the FAFSA	<ol style="list-style-type: none"> Submit a signed copy of Student’s (and Spouse’s) 2021 amended Federal Tax Return (IRS Form 1040-X) Submit Student’s (and Spouse’s) 2021 IRS Tax Return Transcript <i>or</i> Signed copy of Student’s (and Spouse’s) 2021 IRS Form 1040 including all filed schedules 						
<input type="checkbox"/>	Filed a 2021 Amended Tax Return <i>and</i> used the IRS Data Retrieval Tool on the FAFSA	<ol style="list-style-type: none"> Submit a signed copy of Student’s (and Spouse’s) 2021 amended Federal Tax Return (IRS Form 1040-X) 						
<input type="checkbox"/>	Filed a 2021 Tax Return <i>and</i> Did not use the IRS Data Retrieval Tool on the FAFSA	<ol style="list-style-type: none"> Submit Student’s (and Spouse’s) 2021 IRS Tax Return Transcript <i>or</i> Signed copy of Student’s (and Spouse’s) 2021 IRS Form 1040 including all filed schedules 						
<input type="checkbox"/>	Filed a 2021 Tax Return <i>and</i> Used the IRS Data Retrieval Tool on the FAFSA	<ol style="list-style-type: none"> No additional Income documents needed at this time 						

To obtain a 2021 IRS Tax Return Transcript, Wage/Income Transcript, or IRS Non-Filing Transcript you may:

- Go to www.irs.gov; click on “get your tax record” and choose to download a copy or order a copy to be mailed to you (you will need personal information to create an account).
- Call the IRS at 1-800-908-9946 (generally received in about 10 days)
- To request a paper form, complete and mail IRS Form 4506-T (generally mailed within 10 days).

Section C. – This section intentionally left blank.

Form continues on next page...

Section D. – Student (and Spouse) Untaxed Income

<p>2021 UNTAXED INCOME - Report total year amounts for 2021 Be sure to complete ALL items in this section If an item does not apply to you, you will enter \$0</p>	<p>DO NOT LEAVE ANY FIELD BLANK</p>
<p>For Military Families on Active Duty in 2021:</p>	
<p>1. Enter BAS amount for 2021 (Do not include BAH) 2. Attach most recent LES</p>	<p>\$ _____ / Year</p>
<p>For Civilian Families (such as clergy or others)</p>	
<p>1. List \$ amount of Housing/Food/Other Living Allowances paid in 2021 (include cash payments/cash value of benefits)</p>	<p>\$ _____ / Year</p>
<p>Payments to Tax-Deferred Pensions/Savings Plans - Paid directly or withheld from earnings including amounts reported on 2021 W-2 in boxes 12a-12d (codes D, E, F, G, H, and S)</p>	
	<p>\$ _____ / Year</p>
<p>Veteran Non-Education Benefits - such as Disability, Death Pension, DIC, and VA Educational Work-Study Allowances.</p>	
<p>1. List the source of this Income _____</p>	<p>\$ _____ / Year</p>
<p>Other Untaxed Income/Benefits, Cash received, money paid on your behalf, not listed above. Includes worker's compensation, disability income, etc. Do not include Social Security Benefits</p>	
<p>1. List the source of this Income _____</p>	<p>\$ _____ / Year</p>

Section E. – Signatures

Required Signatures: Digital Signatures not accepted

I certify that all information reported on this form is complete and correct. I understand that changes in the FAFSA information based on the documentation provided may result in a change in financial aid eligibility.

Student (Wet Ink Signature - No digital signatures) _____ Date _____

Effective 9/23/2018, the IRS began masking certain personally identifiable information (PII) on the Tax Return Transcript and all other tax transcripts to help protect this information. To help our office identify tax transcripts that belong to family members other than the student (such as Spouse), please provide the name and last 4 digits of that family member's Social Security Number:

Spouse Name:	Last 4 digits of Social Security Number:
	XXX - XX - ____ ____ ____ ____

Warning: If you purposely give false or misleading information on this worksheet, you may be fined or sentenced to jail or both.

Please upload this completed form within your Financial Aid Student Portal at:

<https://finaid.park.edu/NetPartnerStudent>
 Student Financial Aid Office, finaid@park.edu, 816-584-6290