

Your Free Application for Federal Student Aid (FAFSA) has been selected for a process called "Verification". In this process, the Financial Aid Office will be comparing the information on your FAFSA application with tax forms and other financial documents. Federal law states that we have the right to ask for this information before awarding Federal Aid. You must complete this form and provide copies of all requested paperwork within 2 weeks of receipt. Incomplete paperwork will be returned to you for completion which will delay the processing of your financial aid award.

A. Student Information

Last Name	First Name	M.I.	Social Security Number
Address (include apt. no.)			Date of Birth
City	State	Zip Code	Phone number (include area code)

B. Family Information

List the people in your household, including:

1. Yourself
2. Your spouse (if you have one)
3. Your children, if you will provide more than 50% of their support from July 1, 2012 through June 30, 2013, even if they do not live with you
4. Other people if they now live with you and you will provide more than 50% of their support and will continue to provide more than half their support from July 1, 2012 through June 30, 2013

Write all names and ages of all household members in the spaces below. Also write in the name of the college for any household member, who will be attending at least half-time between July 1, 2012 and June 30, 2013, and will be enrolled in a degree, diploma or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Missy Jones (example)	24	Wife	Central University
		Self	

C. Food Stamp Benefits

Did you or anyone in your household receive food stamps during 2010 or 2011?

- Yes.
- No.

D. Student's Tax Forms and Financial Information

1. Did you file a 2011 Federal Tax Return? Tax returns include the 2011 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

- Yes. *If yes, check only one box below*
- Check here if you used the IRS Data Retrieval function within the FAFSA and the data retrieved was unchanged. *(If the IRS Data Retrieval function within the FAFSA was not used or the IRS Data Retrieval function was used, but the data was changed, you must request a 2011 Federal Tax Return Transcript from the IRS (see IRS Tax Return Transcript Request Process form)).*
 - Check here if you are attaching a **signed** copy of your Federal Tax Return Transcript.
 - Check here if a **signed** copy of your Federal Tax Return Transcript will be submitted to the school by _____ (date).
- No, I will not file and am not required to file a 2011 U.S. Income Tax Return. Complete the chart below to list all income received in 2011. (Attach all applicable 2011 W-2's.)

Source of Income	2011 Amount

2. Child Support Paid—Complete the chart below if you paid any child support in 2011. If you need more space, attach a separate page.

Paid to (Payee)	Paid for (child's name)	Amount Paid in 2011	Signature of Payer

E. Spouse's Tax Forms and Financial Information (if student is married)

1. Did your spouse file a 2011 Federal Tax Return? Tax returns include the 2011 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

- Yes. *If yes, check only one box below*
- Check here file if you filed a joint tax return and if the IRS Data Retrieval function within the FAFSA was used and the data retrieved was unchanged. *(If the IRS Data Retrieval function within the FAFSA was not used or the IRS Data Retrieval function was used, but the data was changed, you must request a 2011 Federal Tax Return Transcript from the IRS (see IRS Tax Return Transcript Request Process form)).*
 - Check here if you are attaching a **signed** copy of your spouse's Federal Tax Return Transcript.
 - Check here if a **signed** copy of your spouse's Federal Tax Return Transcript will be submitted to the school by _____ (date).
- No, spouse will not file and are not required to file a 2011 U.S. Income Tax Return. Complete the chart below to list all income received by your spouse in 2011. (Attach all applicable 2011 W-2's.)

Source of Income	2011 Amount

2. Child Support Paid—Complete the chart below if your spouse paid any child support in 2011. If you need more space, attach a separate page.

Paid to (Payee)	Paid for (child's name)	Amount Paid in 2011	Signature of Payer

F. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. If married, spouse's signature is optional.

Student Date

Spouse Date

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

IRS Tax Return Transcript Request Process

The preferred method for supplying tax data on the FAFSA is to make a correction to the FAFSA and use the IRS Data Retrieval Tool to transfer the data directly from the IRS into the FAFSA. By doing this, we will receive the correction within a week of the submitted correction. Provided the transferred data was not changed, we would not require the tax transcripts which can take up to 10 days for you to receive from the IRS and additionally the mail time to submit them to the Financial Aid Office.

Tax filers can request a Federal Tax Return Transcript, free of charge, from the IRS in one of three ways. The telephone method is the preferred method.

1. Telephone Request

- Call the IRS at 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. *(Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.)*
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2011**”.

If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request. *IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.*

2. Online Request

- Go to www.irs.gov
- On the homepage, under the ‘Tools’ section (middle of page), click on ‘Order a Tax Return or Account Transcript’
- Click on ‘Order a Transcript’ (under #3)
- Enter the tax filer’s Social Security Number, date of birth, street address and sip code. *(You must use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.)*
- Click ‘Continue’
- In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select “2011”.

If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS. *IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.*

3. Paper Request Form – IRS Form 4506T-EZ—*(IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.)*

- Download the form at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Please do **NOT** have the IRS Tax Return Transcript mailed directly to Lakeland College as we may have difficulty matching a parent’s incoming IRS Tax Return Transcript to a student’s file, as the two names may be different.
- On line 6, enter “**2011**” to receive IRS tax information for the 2011 tax year that is required for the 2012-2013 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.

Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.

NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.