

A. Student InformationStudent ID **E** _____ Legal Name _____**B. Household Information**

1. Write the names of all the people in the student's household. Include:

- ✓ The student (yourself)
- ✓ Your spouse, if you are married.
- ✓ Your or your spouse's children, if you or your spouse will provide more than half of their support July 1, 2019 and June 30, 2020, even if the children do not live with you.
- ✓ Other people, if they now live with you and your spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2020.

2. Include the date of birth of each person and his or her relationship to you (the student).

3. Add the name of the college for any household member who will be enrolled in a degree, diploma, or certificate program at least half-time between July 1, 2019 and June 30, 2020.

If more space is needed, provide a separate page with your name and EMU ID number at the top.

Full Name	Date of birth	Relationship to you	Name of College
1.		<i>Self</i>	<i>Eastern Michigan University</i>
2.			
3.			
4.			
5.			
6.			

C. Untaxed IRA Distributions & Pensions (Rollover)

Did you (the student) or your spouse report any Rollover IRA Distributions or Pensions on your 2017 Federal Tax Return 1040 (lines 15a and 16a) or 1040A (lines 11a and 12a)?

☐

Yes. Please submit the following:

☐

No. Proceed to Section D.

- ☐
- Indicate any rollover amounts for 2017

- ☐
- 2017 1099-R forms (Distributions from Pensions, Annuities, Retirement or Profit Sharing Plans, IRs, Insurance Contracts, etc.)

D. Student Federal Tax Information

Check the box that applies below. *Be sure to complete and submit any additional requirements indicated with a ✓*

- ☐ Student (and spouse, if married) filed a 2017 Federal Tax Return, Puerto Rican, or Foreign Income Tax Return.
- ☐ Student (and spouse, if married) was employed and had income, but did not file and was not required to file a 2017 Federal IRS Tax Return.
- ✓ List all employers and amount that was earned in 2017 in the chart below.
 - ✓ Submit copies of ALL student (and spouse) 2017 W-2 statements.
 - ✓ You must also submit a Verification of Non-Filing Letter from the IRS. *(Please see page 3 for instructions on ordering a Non-Filing Letter)*

Name of Employer	Amount Earned in 2017	2017 W-2 Form received from employer?
	\$	<input type="radio"/> Yes <input type="radio"/> No
	\$	<input type="radio"/> Yes <input type="radio"/> No
	\$	<input type="radio"/> Yes <input type="radio"/> No

- ☐ Student (and spouse, if married) was not employed, did not have income and was not required to file a 2017 Federal IRS Tax Return.
- ✓ You must also submit a Verification of Non-Filing Letter from the IRS. *(Please see page 3 for instructions on ordering a Non-Filing Letter)*

E. Asset Information *Do not leave blank. Indicate zero or Not Applicable (N/A) if appropriate.*

- As of the date you filed the 2019-2020 FAFSA, what is your total current balance of cash, savings and checking accounts?
Do not include student financial aid.
\$ _____
- As of the date you filed the 2019-2020 FAFSA, what is the net worth of your investments, including real estate? Net worth means current value minus debt. *Investments include: real estate (do not include the home in which you live), rental property, trust funds, UGMA/UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans. Do not include the value of life insurance; retirement plans (pension funds, annuities, non-educational IRAs, Keogh plans, etc).*
\$ _____
- As of the date you filed the 2019-2020 FAFSA, what is the net worth of your current businesses and/or investment farms?
Business or farm value includes the current market value of land, buildings, machinery, equipment, inventory, etc. Do not include the net worth of a family owned and controlled small business with no more than 100 full-time or full-time equivalent employees.
\$ _____

Signing below certifies that all of the information reported is complete and correct. The student must sign and date.

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

Student's Signature

Date

Instructions for completing IRS Data Retrieval Tool and ordering IRS documents

IRS Data Retrieval instructions


- ☐ Log in to your current FAFSA or start a new FAFSA at fafsa.gov.
- ☐ In the finances section of the FAFSA, you will see a "Link to IRS" button if you are eligible to use the DRT.
- ☐ Click the "Link to IRS" button and log in to the IRS to retrieve your tax return information.
- ☐ Review your tax return information, and see the tax data that will be transferred into your FAFSA.
- ☐ Check the "Transfer My Tax Information into the FAFSA" box, and click the "Transfer Now" button.
- ☐ Review your federal tax return information that has been transferred into the data fields on your FAFSA.

Both students and parents can use the IRS DRT. To learn more about the IRS DRT, visit StudentAid.gov/irsdrt.

2017 IRS Tax Return Transcript Request Instructions

Get Transcript by MAIL (5-10 calendar days) <u>preferred method</u>	Get Transcript by Phone (5-10 business days)	Get Transcript Online (Immediate access, but can be challenging)
Request Online: https://www.irs.gov/individuals/get-transcript <input type="checkbox"/> SSN or ITIN <input type="checkbox"/> Birthdate <input type="checkbox"/> Mailing Address from your last tax return <input type="checkbox"/> Request Return Transcript <p style="text-align: center;"><i>or</i></p> Paper Request Form 4506-T <input type="checkbox"/> Download the form at https://www.irs.gov/pub/irs-pdf/f4506t.pdf <input type="checkbox"/> Complete items 1a - 4 <input type="checkbox"/> Check Line 6(a) Return Transcript Sign <input type="checkbox"/> and date the form	Dial: 1-800-908-9946 <input type="checkbox"/> SSN <input type="checkbox"/> Street Address (number only) <input type="checkbox"/> Select "Option 2" to request an IRS Tax Return Transcript for 2017. The tax transcript will be mailed to the address reported on the tax return.	Visit: https://www.irs.gov/individuals/get-transcript First time users will need to register and provide the following Required information: <input type="checkbox"/> Full Name <input type="checkbox"/> Email <input type="checkbox"/> Birthdate <input type="checkbox"/> SSN or ITIN <input type="checkbox"/> Tax Filing Status <input type="checkbox"/> Current Address <input type="checkbox"/> Mobile Account/Phone and one of the following <input type="checkbox"/> Credit Card, or <input type="checkbox"/> Mortgage or Home Equity Line of Credit, or <input type="checkbox"/> Home Equity Line of Credit, or <input type="checkbox"/> Auto Loan
<i>Mailing address for Michigan residents only</i> IRS RAIVS Team Stop 37106 Fresno, CA 93888 <i>*Other states please refer to the instruction sheet on the 4506-T form.</i>		

2017 Verification of Non-Filing Letter Request Instructions

- ☐ Download the 4506-T form at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- ☐ Complete items 1a - 4
- ☐ Check line 7 (Verification of Non-Filing)
- ☐ Input "12/31/2017" into line 9
- ☐ Sign and date the form
- ☐ Mail the completed form to 
- ☐ Receive letter in 5-10 calendar days

Special Note: If you attempted and have been unable to get a Verification of Non-Filing from the IRS, please contact our office for further instructions.

Mailing Address for Michigan residents only
IRS RAIVS TEAM
Stop 37106
Fresno, CA 93888

**Other states please refer to the instruction sheet on the 4506-T form.*