

2017 Income & Tax Documentation: If you and/or your parent(s) were required to file a 2017 U.S. tax return, the U.S. Department of Education sanctions only two options for providing this information to PLU:

- 1). The Federal IRS Data Retrieval Tool (DRT) process via the www.fafsa.gov. This is the preferred method. If not eligible to use the DRT then you must obtain:
- 2). A Tax Return Transcript from the IRS website at <http://www.irs.gov/Individuals/Order-a-Transcript>. If parents are living together and filed as "Married, filing separately", "single", or "head of household" in 2017, both parents must request a Tax Return Transcript. If you are a victim of "Tax Administration Identity Theft", you will need to call the IRS' Identity Protection Specialized Unit (IPSU) at 800-908-4490 to obtain a TRDBV transcript.

If you encounter any difficulties in securing your tax documentation contact us for assistance at sfs@plu.edu.

STUDENT'S TAX & INCOME INFORMATION (check only one box below)

A.) I have provided my 2017 U.S. Federal tax return information (1040, 1040A, 1040EZ) using the IRS Data Retrieval Tool via the on-line FAFSA application **NOTE:** This is an option only if your IRS data was successfully transferred to your FAFSA **or**

B.) I have attached a copy of my 2017 U.S. Federal **Tax RETURN Transcript** downloaded from the IRS. (Note: Account Transcripts are NOT acceptable. If the IRS **cannot** provide a Tax Return Transcript, send us that notice with a photocopy of your **signed**, original return) **or**

C.) I did not file and am not required to file. **If you did not work, enter \$0 for amount earned and "none" for employer.** If you worked but did not file any tax return, please list below your employer(s) and any earned income in 2017.

Employer(s) <small>Complete this section if box C. is checked above.</small>	2017 Amount Earned	Were you issued a W-2?	
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)

Attach a W-2 for each employer checked "Yes" above. Please provide an explanation below if W-2 was not issued.

PARENT'S TAX & INCOME INFORMATION (check only one box below)

A.) Parent(s) have already provided their 2017 U.S. Federal tax return information (1040, 1040A, 1040EZ) using the IRS Data Retrieval Tool via the on-line FAFSA application. **If this option was not used**, go to www.irs.gov/transcript and do either B. or C below.

B.) Download and submit parents' 2017 U.S. Federal **Tax Return Transcript** (Not the Account Transcript) **or**

C.) Attempt to download the Tax Return Transcript and submit the IRS on-line response or letter indicating they have no record of a 2017 tax return on file. If parents worked in 2017 worked, please list below their employer(s) and any earned income in 2017. **If they did not work, enter \$0 for amount earned and "none" for employer.** (If parents filed a Puerto Rican or foreign tax return, attach a signed copy of that return.)

Employer(s) <small>This section must be completed if you checked box C. above</small>	2017 Amount Earned	Were parents issued a W-2?	
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)

Attach a W-2 for each employer checked "Yes" above. Please provide an explanation below if W-2 was not issued.

6. SIGN THIS WORKSHEET

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. At least one parent must sign.

Student

Date

Parent

Date

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

IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE

The student must complete **ONE** of the following tasks:

1. Appear in person at Pacific Lutheran University to verify his/her identity by:
 - a. Presenting a valid government-issued photo identification (ID), such as, but not limited to: a driver's license, other state-issued ID, or passport, and
 - b. sign, in the presence of a certified institutional official, the Statement of Educational Purpose below.

OR

2. If the student is unable to appear in person at Pacific Lutheran University to verify his/her identity, the student must provide the following:
 - a. A copy of a valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as, but not limited to: a driver's license, other state-issued ID, or passport; and
 - b. The original notarized Statement of Educational Purpose.

7. STATEMENT OF EDUCATIONAL PURPOSE Sign in the presence of a PLU official or a Notary Public

I certify that I _____ am the individual signing this Statement of Educational Purpose and that the Federal Student Financial Assistance I may receive will only be used for educational purposes and to pay the cost of attending Pacific Lutheran University for 2019-2020.

Student Signature

Date

Name of Institutionally Authorized Individual Reviewing ID

Date

8. NOTARY'S CERTIFICATE OF ACKNOWLEDGMENT (Complete notarization only if submitting this form by mail)

State of _____

City/County of _____

On _____, before me, _____, personally appeared,
Date Notary's Name

_____, and provided to me on a basis of satisfactory evidence of identification

Printed name of signer

_____ to be the above-named person who signed the foregoing instrument.

Type of Government-issued photo ID provided

WITNESS my hand and official seal

Seal

Notary Signature

My commission expires on _____
Date