

2017 Income & Tax Documentation: If you and/or your parent(s) were required to file a 2018 U.S. tax return, you have three options for providing this information to PLU:

- 1). If you successfully transferred your and your parents' tax information using the **IRS Data Retrieval Tool (DRT)** when you filed your FAFSA, you are done. If you did not, you can return to your online FAFSA and may make corrections to your FAFSA by utilizing the DRT to meet this requirement, **or**
- 2). Submit a **Tax RETURN Transcript** from the IRS website at <http://www.irs.gov/Individuals/Order-a-Transcript>. If parents currently live together and filed as "Married, filing separately", "Single", or "Head of Household" in 2018, both parents must request a Tax Return Transcript, (Call 800-908-4490 to obtain a TRDBV transcript if you were a victim of "Tax Administration Identity Theft") **or**
- 3). Submit photocopy or photocopies of **SIGNED** original 2018 1040(s) that were submitted to the IRS.

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

A.) I have provided my 2018 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 either: 1.) A copy of my 2018 U.S. Federal **Tax RETURN Transcript** downloaded from the IRS, or
2.) a photocopy of my **SIGNED**, original IRS 1040, **or**

Note: Account Transcripts are **NOT** acceptable. If you filed a Puerto Rican or foreign tax return, attach a signed copy of that return,

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> | 2018 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 cannot be provided.

PARENT'S TAX & INCOME INFORMATION (check only one box below unless parents filed separately)

A.) Parent(s) successfully transferred their income tax information to your FAFSA using the IRS Data Retrieval Tool (DRT) via the on-line FAFSA application **or**,

B.) Attached is either: 1.) A copy of parents' 2018 U.S. Federal **Tax Return Transcripts** downloaded from the IRS, **or**
2.) A photocopy or photocopies of their **SIGNED** original 2018 IRS tax return

C.) Attach an **IRS Letter of Non-Filing** and list below any employer (s) and any earned income in 2018. If parent(s) did not work, enter \$0 for amount earned and "none" for employer. The IRS Letter of Non-Filing is obtained by requesting a taxtranscript from www.IRS.gov/transcript. If the IRS website is not functioning, attach a letter signed by the parent, describing their attempts to secure this document.

| Employer(s) <small>This section must be completed if you checked box C. above</small> | 2018 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 2020-2021.

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