



Student ID #: _____

Date received: _____

Student's Name: _____

C Verification of 2023 IRS Income Tax Return Information for **STUDENT/SPOUSE TAX FILERS**

Are you a tax filer? (please mark one)

1. Yes continue 2. NO skip Section C proceed to Section D

Important Note: The instructions below apply to the student and spouse if the student is married. Notify the Financial Aid Office if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after the end of the 2023 tax year on December 31, 2023.

Instructions:

Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2023 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules**.

A **2023 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse filed separate 2023 IRS income tax returns, **2023 IRS Tax Return Transcripts or a signed copy of the 2023 income tax return and applicable schedules** must be provided for both.

____ Check here if a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return, applicable forms and schedules and all W-2 forms** is provided.

____ Check here if a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return, applicable forms and schedules and W-2 forms** will be provided later.

Verification is not complete until all required contributors have given consent on your FAFSA application to import federal tax information into the FAFSA, or their IRS tax return transcript has been submitted to NWC's Financial Aid Office.



Student ID #: _____

Date received: _____

Student's Name: _____

D Verification of 2023 Income Information for **STUDENT NONTAX FILERS**

If you have completed Section C on the previous page, skip this Section D. If you skipped Section C on the previous page, complete this Section D.

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2023 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2023.
- The student and/or spouse were employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is provided. You **MUST** provide copies of all 2023 IRS W-2 forms issued to the student and spouse by their employers. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2023 Amount Earned	IRS W-2 or equivalent document(s) Provided Now	IRS W-2 or equivalent document(s) Provided Later
<i>(example) Suzy's Auto Body Shop</i>	<i>\$2,000.00</i>	<i>Yes/No</i>	<i>Yes/No</i>
<i>Total Amount of 2023 Income Earned From Work</i>	<i>\$</i>		

- The student and/or spouse had other income and resources that supported us for the 2023 tax year.

List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.

Source of Income	Annual Amount in 2023
<i>(example) Rental Property</i>	<i>\$4500.00</i>



Student ID #: _____

Date received: _____

E Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

Print Student's Name

Student's ID Number

Student's Signature (Required)

Date

Spouse's Signature (optional)

Date

WAIT!

Did you fully complete and sign this form? Did you attach required documentation? The Financial Aid Office will return any incomplete or unsigned forms for correction, and it will delay your financial aid process. If you have questions concerning this form, please contact the Financial Aid Office.

The Financial Aid Office recommends you make a copy of this worksheet for your records.