



**C. STUDENT FEDERAL TAX RETURN and INCOME INFORMATION:**

**Important:** Please read each statement and complete either section 1, 2, 3 or 4, depending upon which is most accurate. These questions pertain to the student only.

Yes  <input type="checkbox"/>	1. I filed a 2016 U.S. Income Tax Return and have not/will not file an amendment.
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**\*\* If you selected box 1 above, please select the box below (A or B) which describes your data retrieval status.**

<input type="checkbox"/>	A. I have used or will use the IRS Data Retrieval Tool in FAFSA on the Web, to retrieve and transfer 2016 IRS income information into the FAFSA once the 2016 IRS tax return has been filed. <i>The FAFSA verification cannot be completed until the IRS information has been transferred into the FAFSA.</i>  How to use the IRS Data Retrieval Tool in FAFSA on the Web: Go to www.FAFSA.gov, log in to the student's 2018-19 FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA. <b>Please note:</b> If IRS Data Retrieval Tool information is changed, we will not be able to complete verification with that information and will require the 2016 tax return transcript and 2016 W-2s.
<input type="checkbox"/>	B. I am unable, or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and will <b>submit</b> to the Office of Financial Aid one of the following: <ul style="list-style-type: none"> <li>I. <u>Get Transcript by Mail</u>- Go to www.irs.gov, under the Tools heading, click "Get a tax transcript. Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and <b>NOT</b> the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request. <b>You will also be required to submit all W2's from 2016 to the Financial Aid Office.</b></li> <li>II. <u>Get Transcript ONLINE</u>- Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript " and <b>NOT</b> the "IRS Tax Account Transcript." <b>You will also be required to submit all W2's from 2016 to the Financial Aid Office.</b></li> <li>III. <u>Automated Telephone Request</u>- 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request. <b>You will also be required to submit all W2's from 2016 to the Financial Aid Office.</b></li> <li>IV. <u>Paper Request Form</u>- IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally within 10 business days from the IRS's receipt of the paper request form. <b>You will also be required to submit all W2's from 2016 to the Financial Aid Office.</b></li> </ul>

Yes  <input type="checkbox"/>	2. I filed a 2016 U.S. Income Tax Return and have/will be submitting an amendment.  If an <u>Amended Return</u> was filed with the IRS, provide a copy of the original 2016 IRS income tax return that was filed with the IRS or a 2016 IRS Tax Return Transcript (signature not required), a signed copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS, and a copy of any 2016 W-2s.
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Yes  <input type="checkbox"/>	3. I have not/will not file and am not required to file a 2016 U.S. Income Tax Return. Please choose an option below to indicate if you had any income in 2016.
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**\*\* If you selected box 4 above, please select the appropriate box below (A or B).**

<input type="checkbox"/>	A. I was not employed and had no income earned from work in 2016.																
<input type="checkbox"/>	B. I was employed in 2016 and have listed in the grid below, the names of all the employer(s), the amount earned from each employer in 2016, and have attached a copy of any 2016 W-2 Forms or 1099s.  <b>** List every employer, even if they did not issue a W-2 or 1099-MISC.</b> <table border="1" style="width:100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width:35%;">2016 Source of Income</th> <th style="width:15%;">2016 Amount Earned</th> <th style="width:30%;">Earned By (Name)</th> <th style="width:20%;">W-2 or 1099 Attached?</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;">\$</td> <td></td> <td></td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td></td> <td></td> </tr> <tr> <td></td> <td style="text-align: center;">\$</td> <td></td> <td></td> </tr> </tbody> </table>	2016 Source of Income	2016 Amount Earned	Earned By (Name)	W-2 or 1099 Attached?		\$				\$				\$		
2016 Source of Income	2016 Amount Earned	Earned By (Name)	W-2 or 1099 Attached?														
	\$																
	\$																
	\$																

**D. PARENT FEDERAL TAX RETURN and INCOME INFORMATION:**

**Important:** Please read each statement and complete either section 1, 2, 3 or 4, depending upon which is most accurate. These questions pertain to the parent(s) only.

Yes  1. I (and my spouse) filed a 2016 U.S. Income Tax Return and have not/will not file an amendment.

\*\* If you selected box 1 above, please select the box below (A or B) which describes your data retrieval status.

A. I (and my spouse) have used or will use the IRS Data Retrieval Tool in FAFSA on the Web, to retrieve and transfer 2016 IRS income information into the FAFSA once the 2016 IRS tax return has been filed. *The FAFSA verification cannot be completed until the IRS information has been transferred into the FAFSA.*

How to use the IRS Data Retrieval Tool in FAFSA on the Web: Go to www.FAFSA.gov, log in to the student's 2018-19 FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA.

**Please note:** If IRS Data Retrieval Tool information is changed, we will not be able to complete verification with that information and will require the 2016 tax return transcript and 2016 W-2s.

B. I (and my spouse) am unable, or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and will **submit** to the Office of Financial Aid one of the following:

- I. Get Transcript by Mail- Go to www.irs.gov, under the Tools heading, click "Get a tax transcript. Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request. **You will also be required to submit all W2's from 2016 to the Financial Aid Office.**
- II. Get Transcript ONLINE- Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript " and **NOT** the "IRS Tax Account Transcript." **You will also be required to submit all W2's from 2016 to the Financial Aid Office.**
- III. Autmotated Telephone Request- 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request. **You will also be required to submit all W2's from 2016 to the Financial Aid Office.**
- IV. Paper Request Form- IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally within 10 business days from the IRS's receipt of the paper request form. **You will also be required to submit all W2's from 2016 to the Financial Aid Office.**

Yes  2. I (and my spouse) filed a 2016 U.S. Income Tax Return and have/will be submitting an amendment.  
If an Amended Return was filed with the IRS, provide a copy of the original 2016 IRS income tax return that was filed with the IRS or a 2016 IRS Tax Return Transcript (signature not required), a signed copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS, and a copy of any 2016 W-2s.

Yes  3. I (and my spouse) have not/will not file and am not required to file a 2016 U.S. Income Tax Return. You must provide Verification of Non Filing from the IRS of other relevant tax authority dates on or after October 1, 2017 that indicated a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority

\*\* If you selected box 4 above, please select the appropriate box below (A or B).

- A. I (and my spouse) was not employed and had no income earned from work in 2016.
- B. I (and my spouse) was employed in 2016 and have listed in the grid below, the names of all the employer(s), the amount earned from each employer in 2016, and have attached a copy of any 2016 W-2 Forms or 1099s.

\*\* **List every employer, even if they did not issue a W-2 or 1099-MISC.**

2016 Source of Income	2016 Amount Earned	Earned By (Name)	W-2 or 1099 Attached?
	\$		
	\$		
	\$		

**E. HIGH SCHOOL COMPLETION STATUS:**

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2018-2019:

- A copy of the student's high school diploma
  - A copy of the student's final official high school transcript that shows the date when the diploma was awarded
- A copy of a state certificate or transcript received by a student after the student passes a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicated the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree
  - If state law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential
  - If state law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting

If the student is unable to obtain the documentation listed above, he or she must contact the Financial Aid Office.

**F. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE:**

You must appear in person at the Financial Aid Office at Northwest Technical Institute in order to complete the required Identity and Statement of Educational Purpose Form. Please bring a valid government-issued photo ID. If you are unable to appear in person, please contact our office at 479-751-8824.

**G. SIGN THIS FORM:**

By signing this form, I (we) certify that all the information reported on this form is complete and correct. If dependent, at least one parent must sign. **WARNING:** If you purposefully give false or misleading information on this form, you may be fined, sentenced to jail, or both.

**X** \_\_\_\_\_ Date \_\_\_\_\_  
Student Signature

**X** \_\_\_\_\_ Date \_\_\_\_\_  
Parent/Step-parent Signature

**NOTE:** This form will be returned to you if information is not fully and accurately completed.