



2022-2023 NON-TAX FILER STATEMENT

Your FAFSA application has been selected for a review process called verification. In this process, Samuel Merritt University will compare the information from your FAFSA with the documentation you, your parent(s)/spouse provide. Since you have indicated that you will not and are not required to file a tax return for the 2020 year, we must collect this form from you, your parent(s) or spouse. We are unable to process your financial aid application without this statement. This form must be completed by each person in your household who did not file a tax return in 2020 and provided data on your FAFSA.

A. Student information

Form with fields for Last Name, First Name, Middle Initial, Student ID#, Date of Birth, and Phone Number.

B. Acknowledgement of Non-Filing

The following statements are to be completed and this form signed by:

- ( ) Applicant ( ) Applicant and Spouse ( ) Parent(s) of Applicant

- I (we) did not file a Federal Income Tax Return, IRS Form 1040 or 1040A/EZ for 2020 for the following reason (check one):
( ) Received no taxable income
( ) Taxable income received was less than the amount required for filing a tax return.
Other(explain):
My (our) total income (taxable and/ or non-taxable) for 2020 was \$ from the following sources: please be sure to attach W-2 forms
( ) Work Study Wages =
( ) Non Work Study Wages =
Other(explain):

C. IRS Verification of Non-Filing Letter for 2021 (Only Independent & Parents of Dependent Students Required)

All non-tax filers are required to provide a Verification of Non-filing status letter dated on or after October 1, 2020 that indicates a 2020 IRS income tax return was not filed with the IRS. See the attached instructions for information on how to request Verification of Non-filing.

NON-TAX FILERS MUST SIGN THE FOLLOWING STATEMENT: I have not filed, am not required to file and will not file a 2020 Federal Income Tax Return.

Signature and Date lines for Parent 1 and Parent 2.

#### **D. Certification of Document**

I certify that all information reported is complete and correct to the best of my ability, and that I have attached relevant documentation, if applicable. I understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal and/or repayment of financial aid and maybe subject to fines, imprisonment, or both.

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Student Signature

Date

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Parent/Spouse Signature

Date

#### **How to Request Verification of Non-filing:**

(NOTE: Only Independent & Parents of Dependent Students are required to submit Verification of Non-filing).

Verification of Non-filing provides proof that the IRS has no record of a filed Form 1040, 1040A or 1040EZ for the year you requested. Non-Tax filers can request an IRS Verification of Non-filing of their 2020 tax return status free of charge.

#### Online Request

- Available on the IRS Web site at [www.irs.gov](http://www.irs.gov).
- Click on "File" on the homepage (top left under IRS logo).
- Under "Popular" click on "Get Your Tax Record".
- Click "Get Transcript Online".
- Enter the non-tax filer's Social Security Number, email address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associated with your name.
- Click "Continue".
- Select "Verification of Non-filing Letter" and in the Tax Year field, select "2020".
- If successfully validated, you will be able to view your IRS Verification of Non-filing Letter.