

C. Student Tax Information:

1. Check here if you have used the IRS Data Retrieval Tool and the information is unchanged.
 Check here if you are providing a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules.
 Check here if you will not file and are not required to file a 2021 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at http://www.samuelmerritt.edu/financial_aid/forms

D. Spouse's Tax Information:

1. Check here if you have used the IRS Data Retrieval Tool and the information is unchanged.
 Check here if you are attaching a 2021 IRS Tax Return Transcript or a signed copy of the 2021 income tax return and applicable schedules.
 Check here if you will not file and are not required to file a 2021 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at http://www.samuelmerritt.edu/financial_aid/forms

A **2021 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 2021 IRS income tax returns, the IRS DRT cannot be used and the **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** must be provided for each.

- Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** is provided.
- Check here if a **2021 IRS Tax Return Transcript(s) or a signed copy of the 2021 income tax return and applicable schedules** will be provided later.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide **both** of the following:

1. A **Tax Return Data-Base View (TRDBV) transcript** obtained from the IRS for year 2021; contact the IRS at 1-800-908-4490;
2. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2021 must provide **both** of the following:

1. A **2021 IRS Tax Return Transcript** (signature not required); OR a **signed copy of the 2021 Income Tax Return and All Schedules you and your parents completed: AND**
2. A **signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return,"** that was filed with the IRS.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed a 2021 income tax return with a tax authority other than the IRS may provide a **signed** copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority.

Signatures:

Each person signing this form certifies that all the information reported on 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, be sentenced to jail or both.

Student

Date

Spouse

Date