

B. Student's Income Information to be Verified

Did the student (and spouse) file, will file, or is required to file an income tax return? If YES, Answer #1 ; If NO, Answer #2

1. TAX RETURN FILERS

Instructions: Complete this section if the student filed, will file or is required to file a 2016 tax return. The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA application.

California Dream Act students – There is no IRS DRT within the application. You must submit a tax return transcripts from the IRS. If you and your spouse filed separate returns, you must submit both tax return transcripts. In most cases, no further documentation is needed to verify 2016 income information.

Check the box that applies:

The student has used the IRS DRT to transfer 2016 IRS income tax return information into their FAFSA.

If the student is unable to use the IRS DRT, a **Tax Return Transcripts from the IRS** must be submitted. To obtain a 2016 IRS Tax Return Transcript, go to www.irs.gov/Individuals/Get-Transcript. To use **Get Transcript Online**, you must have a Social Security number (SSN) and immediate access to your email account to confirm your email address. Then you'll need to answer personal, financial and tax related question to verify your identity. To use **Get Transcript by Mail**, you need your SSN or an Individual Tax Identification Number (ITIN), date of birth, and address from your latest tax return. You may also call (800) 908-9946 and follow the prompt to have a Tax Return Transcript mailed to you.

The student (and spouse) has attached 2016 IRS Tax Return Transcript(s).

2. TAX RETURN NONFILER

Instructions: Complete this section if the student will not file and is not required to file a 2016 IRS income tax return.

Check the box that applies:

The student (and spouse) was not employed and had no income earned from work in 2016.

How did you (the student) support yourself and your household in 2016?

The student (and spouse) was employed in 2016 and has listed below all employers, the amount earned from each and whether an IRS W-2 form is attached. Attached copies of all 2016 W-2 forms issued to the student (and spouse) by employers. *List every employer even if they did not issue an IRS W-2 form.*

Employer's Name	2016 Amount Earned	W-2 attached?	
		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		<input type="checkbox"/> Yes	<input type="checkbox"/> No
		<input type="checkbox"/> Yes	<input type="checkbox"/> No

Note: We may require you to provide documentation from the IRS that indicates a 2016 IRS income tax return was not filed with the IRS.

3. ASSET INFORMATION

As of today, what is the student's (and spouse's) total current balance of cash, savings and checking accounts? Don't include student financial aid.

\$ _____

As of today, what is the net worth of Student's (and spouse's) investment, including real estate? Don't include the home the student lives in.

\$ _____

As of today, what is the net worth of Student's (and spouse's) current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

\$ _____

C. Certification and Signature

By signing this worksheet, you certify that all of the information you provided is true and complete to the best of your knowledge. **Warning: If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.**

Student's Signature

Date

Spouse's Signature

Date

For more information about the financial aid programs at LBCC, visit our web site at: <https://www.lbcc.edu/financial-aid>