

C. Tax Forms and Income Information

You must provide 2019 federal tax information as part of the Verification Process for both you (the student) and your spouse (if married). Please indicate below how you are providing this data to us.

Check one:

___ My 2019 IRS data has already been transferred onto my FAFSA via the IRS Data Retrieval Tool (DRT) option available to me.

(ATTENTION MARRIED STUDENTS FILING SEPARATELY: You do not have the option of IRS data transfer to your FAFSA. If you and your spouse filed separately, each person must submit a 2019 IRS Tax Return Transcript to Walsh University.)

___ I am attaching my/my spouse's (if married) federal 2019 IRS Tax Return Transcripts that I obtained from the IRS. *Please list your name (the student) and your student ID number at the top of the transcripts before submitting them to the Student Service Center.

(You may order transcripts by going to www.IRS.gov and clicking on "Get Your Tax Record" option, by calling 800-908-9946 or by completing and mailing Form 4506-T to the IRS.

___ I/my spouse (if married) will not file federal taxes for 2019 *and am not required to do so*. In this case, the following is required:

Was income earned even though you/your spouse did not file? _____

If yes, you MUST provide the following:

- Indicate the amount(s) of money you/your spouse earned from work: _____
- What was the source of the income? _____
- Enclose a copy of you/your spouse's 2019 W-2(s)

REQUIRED (even if no income was earned): Provide documentation from the IRS dated on or after October 1, 2020 that indicates a 2019 IRS income tax return was not filed with the IRS or other relevant tax authority for you/your spouse. This can be obtained by completing an IRS form 4506-T or by going to www.irs.gov and attempting to request a tax return transcript for 2019. (If married, separate documentation is required for each person.)

___ I filed a 2019 Tax Deadline Extension. (Walsh will contact you with additional instructions.)

D. Sign this Worksheet

Each person signing below certifies that all of the information reported is complete and correct.

Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student's Signature

Date _____

Spouse's Signature (if married)

Date _____

DO NOT submit this form until you have gathered all required documents/forms to avoid delays in processing. Once you have all of your required documents gathered, please return them to the Student Service Center in Farrell Hall. You may fax, mail, or drop off your documents. Forms can also be uploaded to our secure financial aid document portal. Instructions can be found at <https://www.walsh.edu/uploads/securely-send-documents-to-walsh.pdf>.