

STUDENT FINANCIAL ASSISTANCE

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Preparing people to lead extraordinary lives

2009-2010 PARENT TAX FORM VERIFICATION AND WAIVER

Student Name: _____ **Loyola ID:** _____
(Please print) (Your 11-digit Loyola ID number begins 0000.)

Read, complete and follow the directions next to the appropriate check box below. You should answer and provide information for the parent(s) whose information was provided on the Free Application for Federal Student Aid (FAFSA). Attach all required documents to this form. Please print the student's name and Loyola ID number, if issued, on each page submitted.

- In 2008, your parents worked and filed a federal tax return. **Attach a signed copy of your parents' 2008 federal tax return with all schedules and W-2 forms attached. Send us copies of all materials that your parents sent to the IRS. Note: Documents will not be returned.**
- Tax returns that are missing signatures, schedules or W-2 forms will be returned, without being reviewed.
 - W-2 forms are required because they contain information about untaxed income (e.g. retirement plan contributions) that is not listed on the tax return. If your parents do not have copies of their 2008 W-2 forms, they may request copies from their employers. If they cannot obtain copies, complete Section 2C on reverse.
 - A tax preparer's summary statement is not acceptable because it does not give specific information about individual items on the tax return.

If your parents do not have a copy of their 2008 federal income tax return, they can request a transcript from the Internal Revenue Service by calling: **800.829.1040.

**If your parents do not have copies of W-2 Forms, they should contact their employer for replacement forms.

- In 2008, your parents worked, but did not file a tax return. **Check one of the following boxes and follow the instructions to report your parent(s)' income.**
- Your parent earned less than \$8,950 (\$17,900 combined, if married). **Complete Section 2A on reverse and attach documentation for this income. If no income, please explain.**
- Your parent earned more than \$8,950 (\$17,900 combined, if married), but did not file a tax return.

Note: If your parent(s) earned more than \$8,950 (\$17,900 if married), the IRS likely required that a tax return be filed.

- Your parents have 2008 W-2 forms. **Complete Sections 2A and 2B on reverse indicating all employers and amounts earned. Attach required W-2 forms.**
- Your parents do not have 2008 W-2 forms. Your parents have contacted their employers and are unable to obtain duplicate copies. **Complete Sections 2A, 2B and 2C on reverse indicating all employers and amounts earned. OSFA will review your situation. W-2 forms may still be required.**
- In 2008, your parents did not work. If your parents did not work but received income from other sources, **complete Section 2A on reverse and attach documentation for this income.**



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2009–2010 Parent Tax Form Verification & Waiver

Student Name: _____

Loyola ID: _____

Section 2A

My parents did not and will not file a 2008 federal tax return with the IRS. My parents' income came from the following sources:

<u>Description of Income</u>	<u>Amount</u>
_____	_____
_____	_____
_____	_____
_____	_____

Attach documentation (or an explanation) of this income: copies of W-2 forms, Social Security benefits statements, etc. If your parents do not have documentation, please attach a full explanation of the situation.

Tax waivers that are missing supporting documentation **will be returned without being reviewed.**

Section 2B

If your parents earned more than \$8,950 (single) or \$17,900 (married filing jointly), they were most likely required by the IRS to file a tax return. Please explain your parents' filing situation and whether they will be filing a tax return.

Section 2C

If your parents earned more than \$8,950 or \$17,900 (married filing jointly) but do not have their 2008 W-2 form(s) and—after contacting their employers—remain unable to obtain copies, please explain the situation below. Note: OSFA may determine that submission of W-2 forms is required.

Certification Statement:

All of the information provided by me or any other person on this form is accurate and complete to the best of my knowledge. If requested, we agree to give proof of the information we have provided on this form. Proof may include court documents, canceled checks, etc. Failure to provide the requested information will result in the loss of financial aid eligibility.

Mother/Stepmother's Signature

Date

Father/Stepfather's Signature

Date