

STUDENT FINANCIAL ASSISTANCE

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Scan completed form and E-mail to finaidforms@luc.edu



Preparing people to lead extraordinary lives

2009-2010 STUDENT TAX FORM VERIFICATION AND WAIVER

Student Name: _____
(Please Print)

Loyola ID: _____
(Your 11-digit Loyola ID number begins 0000.)

Read, complete and follow the directions next to the appropriate check box below. Attach all required documents to this form. Please print the student's name and Loyola ID, if issued, on each page submitted.

- In 2008, I (and/or my spouse, if applicable) worked and filed a federal tax return. **Attach a signed copy of your/your spouse's 2008 federal tax return with all schedules and W-2 forms attached. Send us copies of everything you sent to the IRS. Note: Your 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 your tax return. If you do not have copies of your 2008 W-2 forms, you may request copies from your employers. If you 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 you do not have a copy of your 2008 federal income tax return, you can request a transcript from the Internal Revenue Service by calling: **800.829.1040.

**If you or (your spouse) do not have copies of W-2 Forms, they should contact their employer for replacement forms

- In 2008, I (and/or my spouse) worked, but did not file a tax return. **Check one of the following boxes and follow the instructions to report your/your spouse's income.**
- I earned less than \$8,950 (\$17,900 combined with spouse, if married). **Complete Section 2A on reverse and attach documentation for this income. If no income, please explain.**
- I earned more than \$8,950 (\$17,900 combined with spouse, if married), but did not file a tax return. Note: If you earned more than \$8,950 (\$17,900 if married), the IRS likely required that a tax return be filed.
- I (and my spouse, if applicable) have 2008 W-2 forms. **Complete Sections 2A and 2B on reverse indicating all employers and amounts earned. Attach required W-2 forms.**
- I (and my spouse, if applicable) do not have 2008 W-2 forms. I have contacted my employer and am 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, I did not work. If you 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 Student Tax Form Verification & Waiver

Student Name: _____

Loyola ID: _____

Section 2A

I did not and will not file a 2008 federal tax return with the IRS. My/my spouse's 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 you do not have documentation, please attach full explanation of the situation.

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

Section 2B

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

Section 2C

If you earned more than \$8,950 or \$17,900 (married filing jointly) but do not have your 2008 W-2 form(s) and—after contacting your employer—remain unable to obtain a copy, please explain situation below. Note: OSFA may determine that your 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.

Student's Signature

Date

Spouse's Signature (if applicable)

Date