

Section B: Student Tax Return and Income Information

1. **Select and verify your 2016 Federal IRS income tax information below:**

- Preferred Method to Verify Income: I used the IRS DATA Retrieval Tool (DRT) on the FAFSA website: www.fafsa.ed.gov and did not make any changes to the information transferred from the IRS.
- I have already completed a tax return, but was not able to use the DRT. An IRS Tax Return Transcript is attached.
- I will file a tax return, but have not filed at this time. I understand my application will not be finalized until this requirement is satisfied.
- I did not have any earned income in 2016.
- I worked in 2016, but DID NOT file and was NOT REQUIRED to file a 2016 Federal IRS income tax return. If you check this box, list below the employers and/or sources of income and the amounts of all income received in 2016. *Attach copy of 2016 W2's.*

Employer's Name and/or Source(s) of Income	2016 Amount Earned
Total Amount of Income Earned From Work	\$

Section C: Spouse Tax Return and Income Information

1. **Your spouse must select and verify their 2016 Federal IRS income tax information below:**

- My spouse used the IRS DATA Retrieval Tool (DRT) on the FAFSA website: www.fafsa.ed.gov and did not make any changes to the information transferred from the IRS.
- My spouse has already completed a tax return, but was not able to use the DRT. An IRS Tax Return Transcript is attached.
- My spouse will file a tax return, but has not filed at this time. I understand my application will not be finalized until this requirement is satisfied.
- My spouse did not have any earned income in 2016.
- I do not have a spouse.
- My spouse worked in 2016, but DID NOT file and was NOT REQUIRED to file a 2016 Federal IRS income tax return. List below the employers and/or sources of income and the amounts of all income received in 2016. *Attach copy of 2016 W2's*

Employer's Name and/or Source(s) of Income	2016 Amount Earned
Total Amount of Income Earned From Work	\$

Please review all the information on this form and any supporting documentation for completeness, including all signatures.

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

Student Signature _____ Date _____

Spouse Signature _____ Date _____

*Please note that email is not always a secure method of communication and may inadvertently expose your information if misdirected. Bluefield College suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Bluefield College will not be responsible for any exposure of data.

IRS Tax Return Transcript Information:

A **2016 IRS Tax Return Transcript** may be obtained through:

- Online Request – Go to www.irs.gov . Select “Get Your Tax Record” and choose one of the following:
 - Get Transcript by Mail- transcripts arrive in 5 to 10 calendar days at the address on file
 - Get Transcript ONLINE – requires creation of an account with personal identifiers.
- Telephone Request – 1-800-908-9946
- Paper Request form – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2016 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2016 paper IRS income tax returns, the 2016 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2016 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcript(s)** must be provided for each.

**** Verification of 2016 Income Information for Individuals with Unusual Circumstances ****

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2016 must provide:

- A signed copy of the IRS Form 1040X that was filed;
- A signed copy of the original return that was filed or a tax return transcript; **and**
- Transcript obtained from the IRS that list tax account information.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

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

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and**
- 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.

*If you are a victim of IRS tax-related identity theft, be sure to contact the IRS Identity Protection Specialized Unit at **800-908-4490**.

Individuals Who Filed Non-IRS Income Tax Returns

An individual who filed or will file a 2016 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer’s income and tax information required to be verified for tax year 2016; **or**
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2016 income tax return(s).

IRS Tax Return Transcript Information:

Extension Filers

An individual who is required to file a 2016 IRS income tax return but have not filed because they have been granted a filing extension by the IRS beyond the automatic six-month extension for the tax year. These individuals must provide:

- Signed statement certifying that the individual:
 - Attempted to obtain the VNF from the IRS or other tax authorities and was unable to obtain the required documentation; and
 - Has not filed a 2016 income tax return and list the sources of and 2016 income, and the amount of income from each source. If self-employed, the signed statement must also include the amount of AGI and U.S. income tax paid for the applicable tax year;
- Copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," the individual filed with the IRS for the appropriate tax year;
- Copy of IRS Form W-2 for each source of 2016 or 2017 employment income received or an equivalent document.