

**2019 TAX FILING RESOLUTION – EXEMPTIONS**

**Student's Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Reason for this form:** After reviewing your financial aid application, the Financial Aid Office has found that you claimed an exemption for yourself, and your parent(s) also claimed you as a dependent on their 2019 tax return. You cannot take an exemption for yourself if another taxpayer is entitled to and has claimed you as a dependent. For more information, refer to *IRS Publication 17 - 2019 Tax Guide for Individuals, Part One, Chapter 3* available online at <https://www.irs.gov/pub/irs-prior/p17--2019.pdf>.

**Action Required:**

1. Before we can process your financial aid, you (the dependent student) must **amend** your 2019 tax return.
2. Submit the following to our office:

a signed copy of **Form 1040X - Amended U.S. Individual Income Tax Return;**

**AND**

a **2019 Tax Return Transcript** or signed copy of your 2019 tax return and applicable schedule(s).  
(Check "Your Eligibility Requirements" in Banner. Submit if status for "IRS tax return data (student)" is anything other than "Submitted to FAO" or "Reviewed by FAO.")

**AND**

a signed copy of this form.

**Certification**

*I certify that all information provided in this document is true, complete and accurate. I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail or both.*

**Student signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Parent signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*(Parent signature required if student is dependent for federal student aid purposes.)*

**See page 2 for instructions to request a Tax Return Transcript**

## Ways to Get Transcripts

To obtain tax transcripts, register to use **Get Transcript Online** at [irs.gov](https://www.irs.gov) to view, print or download all transcript types listed below. If you are unable to register or prefer not to use *Get Transcript Online*, you can order a tax return transcript using *Get Transcript by Mail* at [irs.gov](https://www.irs.gov) or by calling 800-908-9946. Allow 5 to 10 calendar days for delivery. You can also request any transcript type listed below by faxing/ mailing Form 4506-T, Request for Transcript of Tax Return as instructed on the form. Form 4506-T is available at [irs.gov](https://www.irs.gov).

## Transcript Types

The IRS offers the following transcript types at no charge:

- **Tax Return Transcript:** This is the transcript **required by the financial aid office for tax filer verification**.
- **Verification of Non-Filing Letter** is required of **parents and independent students** (students who did not use parent information on the FAFSA) **who have reported they did not file a 2019 tax return**. This letter is available using *Get Transcript Online* or Form 4506-T.
- **Wage and Income Transcript** shows data from the W-2, 1099, 1098 and Form 5498, IRA Contribution Information. This transcript **can be submitted instead of W2s** and is available using *Get Transcript Online* or Form 4506-T.
- **Record of Account Transcript** combines tax return and tax account transcripts into one complete transcript. This transcript is available using *Get Transcript Online* or Form 4506-T and **is acceptable** for financial aid purposes.
- **Tax Account Transcript** is **not** the same as a Tax Return Transcript. It **does not** satisfy the financial aid requirement.

**Note:** When using *Get Transcript by Mail* or phone, the primary taxpayer on a joint tax return must make the request. The secondary spouse will use *Get Transcript Online* or Form 4506-T to request this transcript.

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## INSTRUCTIONS FOR SPECIAL SITUATIONS

### Amended Returns

If you filed an amended tax return, you must submit a 2019 IRS Tax Return Transcript or signed copy of your 2019 tax return with applicable schedule(s) **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return."

### Victim of IRS Identity Theft

A victim of IRS identity theft who is not able to obtain a 2019 IRS Tax Return Transcript must contact the IRS at 1-800-908-4490 to receive a printout of the tax return transcript by mail. Submit this printout along with a signed statement indicating that you were a victim of IRS tax-related Identity theft and that the IRS has been made aware of the tax-related identity theft to the financial aid office.

### Non-IRS Income Tax Returns

An individual who filed a 2019 income tax return with Guam, Northern Mariana Islands, Puerto Rico, or the U.S. Virgin Islands may provide a signed copy of the 2019 income tax return. An individual who filed a 2019 income tax return with American Samoa must provide a tax return transcript from the taxing authority. An individual who filed a 2019 income tax return with a foreign tax authority but provide a tax return transcript from the taxing authority unless the taxing authority charges a fee to obtain the transcript. In that case, provide documentation that there is a fee along with a signed copy of the 2019 income tax return.