



# Sam Houston State University Financial Aid and Scholarships Office

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

## INCOME TAX WORKSHEET 2020-2021

If you make any corrections, white outs, or alterations to any of your information on this form, you MUST initial next to it.

SB

Student Name (blue or black ink only): Sammy Bearkat SAM ID: 00012345

Incomplete verification packets will NOT be accepted.

<p><b>STUDENT SECTION:</b> Did the STUDENT/STUDENT'S SPOUSE file a 2018 tax return with the IRS? <b>(Must choose one.)</b></p> <p><input checked="" type="checkbox"/> Already filed a tax return</p> <p><input type="checkbox"/> Worked but will not file a tax return. Must attach:</p> <ul style="list-style-type: none"> <li>➤ All W-2's/1099's/Schedule C's <b>AND</b></li> <li>➤ Verification of Non-Filing Letter from IRS (independent students only)</li> </ul> <p><input type="checkbox"/> Did not work. Must attach:</p> <ul style="list-style-type: none"> <li>➤ Verification of Non-Filing Letter from IRS (independent students only)</li> </ul>	<p><b>PARENT SECTION:</b> Did the PARENT(S) file a 2018 tax return with the IRS? <b>(Must choose one.)</b></p> <p><input type="checkbox"/> Already filed a tax return</p> <p><input type="checkbox"/> Worked but will not file a tax return. Must attach:</p> <ul style="list-style-type: none"> <li>➤ All W-2's/1099's/Schedule C's <b>AND</b></li> <li>➤ Verification of Non-Filing Letter from IRS</li> </ul> <p><input type="checkbox"/> Did not work. Must attach:</p> <ul style="list-style-type: none"> <li>➤ Verification of Non-Filing Letter from IRS</li> </ul>
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### Options on how to link taxes to the FAFSA, obtain a Tax Return Transcript, Wage & Income Transcript, or Verification of Non-Filing letter from IRS:

<p><b>IRS Data Retrieval Tool:</b> Link 2018 taxes to FAFSA by using the IRS Data Retrieval Tool on <a href="http://www.fafsa.ed.gov">www.fafsa.ed.gov</a>.</p>	<p><b>Request Online:</b> Visit <a href="http://www.irs.gov">www.irs.gov</a> and click "Get Your Tax Record."</p>	<p><b>Order by Phone:</b> Call 1-800-908-9946</p>	<p><b>In Person:</b> Visit your local IRS office. <a href="http://www.irs.gov">www.irs.gov</a> to search locations.</p>	<p><b>By Mail:</b> Complete form 4506-T <i>*This form can also be used to obtain a Verification of Non-Filer Letter from the IRS. Note the 4506-T is submitted to IRS, not Financial Aid and Scholarships Office.</i></p>
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<p><b>If you filed an amended tax return (1040X) provide the following:</b></p> <ul style="list-style-type: none"> <li>➤ Signed copy of 1040X</li> <li>➤ Original Tax Return Transcript</li> </ul>	<p><b>If you are a victim of tax identity theft who is unable to obtain a 2018 Tax Return Transcript you must contact the IRS at 1-800-908-4490.</b></p>
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**WARNING:** If you purposely give false or misleading information you may be fined, sentenced to jail, or both. Each person signing below certifies that all of the information is complete and correct.

Forms must be signed.  
Electronic signatures will not be accepted.

Student Signature: Sammy Bearkat Date: 08/01/20

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Return completed form to: Financial Aid and Scholarships Office  
Box 2328, Huntsville TX 77341-2328 • Fax: 936.294.3668