

401 S. State Street • Chicago, IL 60605 • TEL: 312-935-4077 • FAX: 312-935-4043 • EMAIL: financialaid@robertmorris.edu

The information requested on this form is needed to process your application for financial aid for 2018-2019. Complete this form and return it to the address above within 30 days. All submitted information must include the student's RMU ID number.

Student's Name (Last, First, M.I.)

RMU ID Number (required)

Email Address

2016 FEDERAL INCOME TAX FILING REQUIREMENTS

This Information is from irs.gov Amounts listed are for people under the age of 65; if you are over 65, please visit irs.gov	For most people, a tax return must be filed with the Internal Revenue Service (IRS) if their 2016 income was at least:			
	Single dependent student: (Your parents or someone else can claim you)	\$6,300 (earned income)	Married, Filing Separately	\$4,050 (gross Income)
	Single, if claiming self	\$10,350 (gross income)	Head of Household	\$13,350 (gross Income)
	Married, filing joint return	\$20,700 (gross income)	Qualifying Widow(er) with dependent child	\$16,650 (gross income)

The best way to verify income is by using the *IRS Data Retrieval Tool (IRS DRT)* that is part of *FAFSA on the Web* at *FAFSA.gov*. In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

SECTION A: TAX RETURN FILING

STUDENT (and spouse if applicable): CHOOSE ONE	PARENT(S): CHOOSE ONE
<input type="checkbox"/> I HAVE USED the IRS DRT in <i>FAFSA on the Web</i> to transfer 2016 IRS income tax return information into my FAFSA.	<input type="checkbox"/> I HAVE USED the IRS DRT in <i>FAFSA on the Web</i> to transfer 2016 IRS income tax return information into my student's FAFSA.
<input type="checkbox"/> I have not yet used the IRS DRT in <i>FAFSA on the Web</i> , but WILL USE the tool to transfer 2016 IRS income tax return information into my FAFSA.	<input type="checkbox"/> I have not yet used the IRS DRT in <i>FAFSA on the Web</i> , but WILL USE the tool to transfer 2016 IRS income tax return information into my student's FAFSA.
<input type="checkbox"/> I am unable or choose not to use the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school with a 2016 IRS Tax Return Transcript(s) . (See Page 2 for instructions.)	<input type="checkbox"/> I am unable or choose not to use the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school with a 2016 IRS Tax Return Transcript(s) . (See Page 2 for instructions.)
<input type="checkbox"/> I have NOT and WILL NOT file a 2016 Tax Return with the IRS. (Note: Independent Students must provide IRS Non-Filing Statement & correct FAFSA).	<input type="checkbox"/> I have NOT and WILL NOT file a 2016 Tax Return with the IRS. (Note: Parent must provide IRS Non-Filing Statement & correct FAFSA).

Section B - Certification and Authorization

Do **NOT** submit without **ALL** required signatures. I (we) certify that the information provided on this form is correct and complete. I (we) also agree to contact the RMU Office of Financial Aid if the information provided requires changes.

STUDENT'S SIGNATURE

DATE

PARENT'S SIGNATURE

DATE

SPOUSE'S SIGNATURE (IF APPLICABLE)

DATE

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

- Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

NOTE: If a student and spouse 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.