



New Mexico Junior College

2017–2018 Income Verification Worksheet - Independent Student

Your 2017–2018 Free Application for Federal Student Aid (FAFSA) was selected by the federal processor for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected.

A. Student's Information

Student's Last Name

First Name

M.I.

NMJC Student ID or SS#

B. Independent Student's Income Information

1. **TAX RETURN FILERS** – If the student and spouse filed or will file an income tax return for 2015, you must request a copy of your 2015 IRS Tax Return Transcript from the IRS and submit the tax transcript to the Office of Financial Aid (see page 3 for instructions) **OR** you may provide a signed copy of your 2015 tax return. If the student and spouse filed separate tax returns, both the student's and spouse's 2015 tax return transcripts or signed copies of tax returns are required.

___ Check here if a **2015 IRS Tax Return Transcript(s) or Signed Tax Return(s)** is provided.

___ Check here if a **2015 IRS Tax Return Transcript(s) or Signed Tax Return(s)** will be provided later.

2. **TAX RETURN NONFILERS** – Complete this section if the student and spouse will not file and are not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2015.
- The student and/or spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to the student and spouse by the employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

C. Certification and Signatures

The student's signature below certifies that all of the information reported is complete and correct. The student whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Print Student's Name

NMJC Student ID or SS#

Student's Street Address (include apt. no.)

Student's Date of Birth

City State Zip Code

Student's Email Address

Student's Home Phone Number (include area code)

Student's Alternate or Cell Phone Number

Student's Signature

Date

Do not mail this worksheet to the U. S. Department of Education
Submit this worksheet to:

New Mexico Junior College
Office of Financial Aid
1 Thunderbird Circle
Hobbs, NM 88240

Phone: 575-392-5172 Fax: 575-492-2559
Email: financialaid@nmjc.edu

Please retain a copy of all documentation submitted for your records.

Free 2015 IRS Tax Return Transcript Instructions

1. By Phone: Call the IRS at 1-800-908-9946 and listen closely to prompts.

- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2015.**”
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

2. Online: Available at <http://www.irs.gov>

- In the “**Tools**” Section of the homepage, select “**Get a Tax Transcript**”. Review your options to receive your transcript online or by mail.
 - “**Get Transcript ONLINE**” The online option will allow you to receive your 2015 transcript immediately but you must have access to an email account and an account in your name from either a credit card, mortgage, home equity loan, home equity line of credit, or a car loan. You must also have a mobile phone with your name on the account. If you have this information, select to “**Get a Transcript ONLINE**” and follow the process through to print your transcript.
 - **OR, “Get Transcript by MAIL”**. Enter the tax filer’s Social Security Number, date of birth, street address, and zip code exactly as they appear on the tax return. Use the address currently on file with the IRS. Generally, this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file. Select “Continue” and in the **Type of Transcript** field, select “**Return Transcript**” and in the **Tax Year** field, select “**2015.**” Unacceptable tax forms include an IRS “Tax Account Transcript” and “Tax Summary.” If successfully validated, the tax return transcript will be mailed to the address noted on your 2015 tax return.

3. By Mail: (address provided on form for your home state)

- Use option #3 ONLY if your address has changed from the address listed on your filed tax return.
- **IRS Form 4506T-EZ** should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript. Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete *Lines 1 – 4*, following the instructions on page 2 of the form. Note that *Line 3* should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on *Line 4*. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- *Line 5* provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. **Be Advised:** the school may not be able to match the tax return transcript to a student if the surname is different between the tax form and the NMJC Student.
- On *line 6*, enter “**2015**” to receive IRS tax information for the 2015 tax year that is required for the 2017-2018 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return. Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ. Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.
- **NOTE:** Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

New Mexico Junior College Office of Financial Aid

1 Thunderbird Circle | Hobbs, NM 88240

Toll Free 1-800-657-6260 | 575-392-5172 | Fax 575-492-2559

<http://www.nmjc.edu/student-services/financialaid.aspx> E-mail financialaid@nmjc.edu

For further questions or difficulties receiving your IRS Transcript, please call the IRS at 1-800-829-0922

(Option 1)