

E. Tax Forms & Income Information

Complete this section if you and/or your parents filed or will file a 2020 IRS 2020 income tax return(s). The best way to verify income is by using the *IRS DRT* that is part of FAFSA on the Web at www.FAFSA.gov. A 2020 IRS Tax Return Transcript may be obtained through:

Get Transcript by Mail -go to www.irs.gov and click on the “Get Your Tax Record.” 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.

Get Transcript Online- Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “Return Transcript” and **NOT** the “Account Transcript”. To use the Get Transcript Tool 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 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.

Automated Telephone Request- 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.

1.
 - a) Check here if you and/or your parent(s) successfully used the IRS Data Retrieval Tool.
 - b) Check here if you are attaching your 2020 IRS Tax Return Transcript
2. List Below any person who did not file taxes in 2020 but had income. Provide copies of all 2020 IRS W-2 forms issued to the student by their employees. Parents and students must also submit an IRS Verification of Non-filing request at www.irs.gov/transcript

Employer’s Name	2020 Amount Earned	IRS W-2 Provided?
<i>Name of Non-tax filer</i>	\$2,000.00	Yes

3. Tax filers and non-tax filers must list any untaxed income received in 2020. Enter “0” if no funds were received.

Student /Spouse	FAFSA Questions 44 and/or 92	Parent(s)
\$	Payments to tax -deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to amounts reported on the W-2 Form in Box 12a-12d, codes D, E, F, G,H, and S. Don’t Include amounts reported in code DD.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 10 Schedule 1 – total lines 28+32	\$
\$	Tax Exempt interest income from IRS Form 1040 – line 2a.	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040-line 4a minus line 4b. Exclude rollovers. If negative, enter a zero here.	\$

C. High School Completion

Provide One of the following documents that indicate the student’s high school completion status:

- A copy of the **official high school transcript. Must have the graduation date.**
- A copy of the student’s **GED certificate or GED transcript.**
- If home schooled, provide a **copy of the credential** if state law requires a home-schooled student to obtain a secondary school completion other than a school diploma or recognized equivalent.
- If home schooled and the state law ***does not*** require a home-schooled student to obtain a secondary school completion credential. Provide a transcript or the equivalent signed by the student’s parent or guardian that lists the secondary school courses the student completed that documents the successful completion a secondary school education in a homeschool setting.

D. Identity & Statement of Educational Purpose

(1) Student must provide proof of his/her identity by presenting an unexpired valid-government issued photo Identification such as, a driver’s license, non-driver’s license, passport, or other government-issued photo identification which verifies his or her identity. (2) If you are unable to present the document in person. You may provide a copy of the unexpired government-issued photo identification that is acknowledged with the notary statement below.

Notary’s Certificate of Acknowledgement

State of _____ City/County of _____
On (date), _____, before me (notary name), _____
personally appeared (student name) _____ and proved to
me because of satisfactory evidence of identification (type of ID) _____ to
the above-named person who signed the foregoing instrument.

WITNESS my hand and official Notary Signature _____

Seal

Statement of Educational Purpose

The student must sign, in the presence of the institutional official, the following:

I certify that I,

(Print Name)

am an individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Montefiore School of Nursing.

Student’s Signature: _____ Date: _____

