



Financial Aid
802 Grand Ave
Glenwood Springs, CO 81601
Ph: 800-621-8559
Fax: 970-947-8318
Email: finaid@coloradomtn.edu

Instructions: Complete this document if a 2014 IRS income tax return(s) was or **will be** filed. The most efficient and accurate way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) found on the FAFSA application at fafsa.gov. In most cases, if the DRT is used, no further documentation will be required.

Please note: for Dependent students, both the student **AND** parent(s) **must** verify income and should use the DRT **AND** must complete separate Verification of 2014 IRS Income Tax Return Information worksheets.

In most cases, 2014 income tax return information is available within 2-3 weeks of **electronic** filing. 2014 **paper** income tax return information is usually available within 8-11 weeks from the date it is received by the IRS. Contact the financial aid office if more information is needed regarding the IRS DRT.

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2014 or had a change in marital status after the end of the 2014 tax year.

THIS FORM CORRESPONDS TO (check one): ☐ PARENT TAX INFORMATION ☐ STUDENT TAX INFORMATION

Check the box that applies:

- ☐ The IRS DRT in *FAFSA on the Web* was used to transfer 2014 IRS income tax return information into the student's FAFSA.
- ☐ The IRS DRT in *FAFSA on the Web* was not yet used, but will be used to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.
- ☐ We are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2014 IRS Tax Return Transcript(s)**.

If separate 2014 IRS income tax returns were filed, **2014 IRS Tax Return Transcripts** must be provided for both.

- ☐ Check here if a **2014 IRS Tax Return Transcript(s)** is provided.
- ☐ Check here if a **2014 IRS Tax Return Transcript(s)** will be provided later.

*****For faster processing, we encourage applicants/parents/spouses to utilize the IRS Data Retrieval Tool within the FAFSA. As an alternative, instructions to obtain a 2014 IRS Tax Return Transcript are included on the next page.*****

Certifications and Signatures

Certifications and Signatures: Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Print Student's Name

Student's ID Number

Student's Signature

Date

Parent or Spouse's Signature

Date

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



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A 2014 IRS Tax Return Transcript may be obtained through the:

- Online Request - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Be sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- IRS2Go App – <http://www.irs.gov/uac/IRS2GoApp>
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

Verification of 2014 IRS Income Tax Return Information for Individuals with Unusual Circumstances

Verification of 2014 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2014 IRS income tax return and applied for the automatic extension, provide the following documents:

- A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2014; **AND**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2014.

If an individual is required to file a 2014 IRS income tax return and has been granted an additional extension (beyond October 15) by the IRS, provide the following documents:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2014; **AND**
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2014.

Verification of 2014 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2014, provide the following documents:

- A signed copy of the original 2014 IRS income tax return that was filed with the IRS or a **2014 IRS Tax Return Transcript** (signature not required) for the 2014 tax year; **AND**
- A signed copy of the 2014 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Verification of 2014 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

- A victim of tax administration identity theft who is unable to obtain a **2014 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2014 IRS income tax return information.

Verification of 2014 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

- An individual who filed or will file a 2014 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide:
 - A signed copy of that 2014 income tax return(s); **OR**
 - A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2014.