



# California State University SAN MARCOS

Financial Aid and Scholarships Office Tel: 760.750.4850 Fax: 760.750.3047 [www.csusm.edu/finaid](http://www.csusm.edu/finaid)

## TAX FILING STATUS AND CONFIRMATION OF INCOME - PARENT

**2012-2013**

Student Name: \_\_\_\_\_ Campus Email: \_\_\_\_\_

Campus ID #: \_\_\_\_\_ Phone Number: \_\_\_\_\_

The following information is required to continue processing your 2012 – 2013 financial aid application. In order to verify your parent's 2011 income and wage information, they must provide information in either Category 1 or Category 2. Please complete form using black ink.

### CATEGORY 1: PARENT TAX FILERS

#### ***I HAVE FILED or WILL FILE a 2011 U.S. FEDERAL INCOME TAX RETURN (1040, 1040A, 1040EZ)***

CSU San Marcos is required to verify your tax filing information. We strongly encourage you to utilize the IRS Data Retrieval functionality on the FAFSA – either in the initial filing of the FAFSA, or by submitting a correction at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).

***PLEASE NOTE: Copies of Tax Returns are no longer valid forms of income verification. If you were unable to use the IRS Data Retrieval function on the FAFSA, you MUST obtain a 2011 Tax Transcript from the IRS to submit to our office. Transcripts must be requested by the tax filer directly from the IRS by visiting [www.IRS.gov](http://www.IRS.gov) and selecting "Order a Transcript", or by calling 1-800-908-9946. It may take up to 10 days for the IRS to process the request.***

Check the appropriate box below regarding verification of your tax filing information:

- I have successfully used the IRS Data Retrieval function on the FAFSA.** *No further documents required at this time; sign the Certification Statement below and return this form to our office.*
- I am unable to use the IRS Data Retrieval function on the FAFSA.** (You **MUST** attach your 2011 IRS Tax Transcript).
- My/Our tax filing status was Married Filing Separate.** (Attach **BOTH** 2011 IRS Tax Return Transcripts).
- My filing status was Married Filing Jointly; however I have since Separated, Divorced, or been Widowed.** (Attach your 2011 IRS Tax Transcript **AND** copies of all of your W-2's).

#### ***I HAVE FILED or WILL FILE a 2011 FOREIGN TAX RETURN***

I have attached a signed and translated copy of my foreign tax return, which shows the 2011 Adjusted Gross Income (AGI) and Tax Paid in U.S. dollar equivalency.

### CATEGORY 2: PARENT NON-TAX FILERS

- I AM NOT REQUIRED TO FILE A 2011 FEDERAL INCOME TAX RETURN. I have not / will not file a 2011 Federal Income Tax Return.***

If you checked the above box, you **MUST** complete the 2<sup>nd</sup> page of this form – the Parent Non-Filer Statement.

### PARENT - PLEASE SIGN AND DATE BELOW

Each person signing this form certifies that all the information reported on it is complete and correct. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Father/Step-Father Signature \_\_\_\_\_ Date \_\_\_\_\_

Mother/Step-Mother Signature \_\_\_\_\_ Date \_\_\_\_\_



# California State University SAN MARCOS

Financial Aid and Scholarships Office Tel: 760.750.4850 Fax: 760.750.3047 [www.csusm.edu/finaid](http://www.csusm.edu/finaid)

## PARENT NON-FILER STATEMENT (CALENDAR YEAR 2011)

Student Name: \_\_\_\_\_ Campus Email: \_\_\_\_\_

Campus ID #: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**NOTE: This page should only be completed if your Parent(s) checked the box on Page 1 to indicate they are NOT REQUIRED to file a 2011 Federal Income Tax Return; your Parent(s) have not / will not file a 2011 Federal Income Tax Return.**

- Your Parent(s) SHOULD NOT complete this Non-Filer Statement if they have filed – or will file – a 2011 Federal Tax Return. If your Parent(s) filed or will file a 2011 Federal Tax Return, they must submit a copy of their IRS Tax Transcript(s) or utilize the IRS Data Retrieval on the FAFSA.
- Although your Parent(s) may not be REQUIRED to file a tax return, they must complete the information below. Your Parent(s) MUST REPORT wages from all employment and attach photocopies of any W-2 wage statements.

**DO NOT LEAVE ANY ITEMS BLANK. Enter zero (\$0) under "Amount" if you did not work and/or had no income. Leaving the "Amount" section blank is not an acceptable response.**

### A: FATHER / STEP-FATHER Information

AMOUNT EARNED	NAME OF EMPLOYER/INCOME SOURCE	W-2 Attached Yes/No
\$		
\$		
\$		

### B: MOTHER / STEP-MOTHER Information

AMOUNT EARNED	NAME OF EMPLOYER / INCOME SOURCE	W-2 Attached Yes/No
\$		
\$		
\$		

**If you indicated NO W-2 attached for any of the above, provide an explanation why a W-2 is not available:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## PARENT(S) - PLEASE SIGN AND DATE BELOW

I (we) hereby certify that all information on Non-Filer Statement is accurate and complete to the best of my (our) knowledge. Each person whose information appears above MUST sign below (i.e., if Father's information is listed above, then he MUST sign below).

Father/Step-Father Signature \_\_\_\_\_ Date \_\_\_\_\_

Mother/Step-Mother Signature \_\_\_\_\_ Date \_\_\_\_\_