

## 2016-2017 TAX EXTENSION FILED FOR 2015 TAXES – STUDENT

<b>RETURN TO:</b> CAL POLY FINANCIAL AID OFFICE SAN LUIS OBISPO, CA 93407-0201 <b>FAX: (805) 756-7243</b> <b>EMAIL: <a href="mailto:financialaid@calpoly.edu">financialaid@calpoly.edu</a></b>	Student Last Name:
	Student First Name:
	Phone #: <span style="float: right;">EMPL ID#:</span>

**IMPORTANT: Submit as soon as possible.** Aid will not disburse until all items are submitted and reviewed. Once all items are submitted, allow 3-6 weeks for review. If awarded FWS, SEOG, or Perkins, documents must be submitted no later than June 30, 2016 to avoid potential cancelation of those funds. In all circumstances, for any aid, documents must be submitted prior to the last day of a student's enrollment at Cal Poly.

If you have been granted an IRS tax filing extension, in lieu of providing the Tax Return Transcript or using the IRS Data Retrieval Tool on the FAFSA to provide your 2015 tax information to the Financial Aid Office, you may submit proof of your granted tax filing extension and the required support documents (see below).

Your Financial Aid Award cannot be finalized or released until you **provide the following documentation as proof of tax filing extension (see below).**

**Please note:** You are **NOT** required to provide the Tax Return Transcript or the IRS Data Retrieval once the IRS Tax Extension Form 4868 and required support documents have been provided to the Financial Aid Office.

***For Office Use Only***

  
  
  
  

*Initials* \_\_\_\_\_

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**IF A W-2 WAS ISSUED, PROVIDE:**

- A copy of your IRS Form 4868
- Copies of all 2015 W-2 forms
- A statement or documentation of how you calculated the "estimate of total tax liability." Example of acceptable document(s) for the statement or documentation of how you calculated the "estimate of total tax liability" may include: A copy of the preliminary 1040 form from your CPA or a signed personal statement.

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**IF SELF-EMPLOYED, PROVIDE:**

- A copy of your IRS Form 4868
- Copies of all 1099s, if received
- A signed statement with the amount of your AGI and U.S. income taxes paid and how you calculated "estimate of total tax liability." Example of acceptable document(s) for the statement or documentation of how you calculated the "estimate of total tax liability" may include: A copy of the preliminary 1040 form from your CPA or a signed personal statement.

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**SIGN and DATE:**

I certify that all information reported on this form and any attachment is true, complete, and accurate.

False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

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Student Signature (Required. No electronic signature.)

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Date