

2016-2017 NON-TAX FILER / INCOME STATEMENT – STUDENT

RETURN TO: CAL POLY FINANCIAL AID OFFICE SAN LUIS OBISPO, CA 93407-0201 FAX: (805) 756-7243 EMAIL: financialaid@calpoly.edu	Student Last Name:
	Student First Name:
	Phone # EMPL ID#:

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.

For Office Use Only

Initials _____

Complete Section A OR Section B only.

SECTION A

This form does not apply: I/WE DID FILE a 2015 US or Foreign Tax Return.

Next Steps:

- You must access your FAFSA online at www.fafsa.ed.gov and update your FAFSA application to indicate you have already completed a tax return, and use the IRS Data Retrieval Tool (DRT)
- If you do not qualify to use the IRS DRT, you must submit a copy of your 2015 Tax Return Transcript to our office with your name and EMPLID printed on it. You can request this report at <http://www.irs.gov/Individuals/Get-Transcript>

SECTION B

Please complete this form as it applies to you and/or your spouse (if married) on the 2016-2017 Free Application for Federal Student Aid (FAFSA). Check the box:

I/We did not file a 2015 US or Foreign Tax Return and am/are not required to file. Check table below.

If you (and/or your spouse, if married) did earn income in 2015, please complete the following section and **attach all W-2's**.

Name of Employer / Income Source:

Amount Earned:

W-2 Attached

	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>
	\$	Yes <input type="checkbox"/> No <input type="checkbox"/>

If you no longer have a copy of the W-2 form received from your employer, go to IRS.gov and print the Form 4506-T to request an IRS Wage and Income Statement by mail. If you **DID NOT** receive a W-2 form for an employer listed above, please explain in the area below how you were paid. **PLEASE**

NOTE: If you were self-employed, received 1099 forms instead of W-2 forms, or had cash earnings over \$400, you are required to file a federal tax return.

I/WE DID NOT FILE BECAUSE I/WE MET ONE OF THE FOLLOWING (check below):

This information is from the 2015 IRS 1040 and 1040A Instruction Booklets (see www.irs.gov). Amounts listed are for people under the age of 65; If you are over 65, please refer to the IRS instruction booklets.	For most people, a tax return is not required to be filed with the Internal Revenue Service (IRS) if their 2015 income was:			
	<input type="checkbox"/> Single dependent student (your parents or someone else can claim you as a dependent)	Less than \$6,300 (earned income)	<input type="checkbox"/> Married filing separately	Less than \$4,000 (gross income)
	<input type="checkbox"/> Single, if claiming self	Less than \$10,300 (gross income)	<input type="checkbox"/> Head of household	Less than \$13,250 (gross income)
	<input type="checkbox"/> Married filing jointly	Less than \$20,600 (gross income)	<input type="checkbox"/> Qualifying widow(er) With dependent child	Less than \$16,600 (gross income)

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.

Student Signature (Required. No electronic signature.)

Date

FNFS17