

2017-2018 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, 2017 to avoid potential cancellation 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:

- Access your FAFSA online at www.fafsa.ed.gov and update your FAFSA to indicate you have completed a tax return.
- Submit a copy of your 2015 Tax Return Transcript to our office with the student's name and EMPLID printed on it. Request this report at <http://www.irs.gov/Individuals/Get-Transcript>

SECTION B

Please (1) select this box if you and/or your spouse (if married) did not earn income in 2015 OR (2A) select why you and/or your spouse (if married) had income but were not required to file a 2015 US or Foreign Tax Return, and (2B) identify the sources of income and attach all W-2's if applicable.

(1) I/We did not earn income in 2015 and I/we did not file taxes in 2015.

(2A) I/WE DID NOT FILE AND AM/ARE NOT REQUIRED TO FILE BECAUSE I/WE MET ONE OF THE FOLLOWING CRITERIA (check a box 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 IRS if their 2015 income was:			
	<input type="checkbox"/> Single dependent student (your parent 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)

*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.*

(2B) 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"/>

If you no longer have a copy of the W-2 form from your employer, use 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.

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