



The Authority on Financial Aid

# 2023-2024 Financial Aid Application Procedures for Students Selected for Verification

**Verification:** A process in which students and/or parents provide proof that the information reported on the FAFSA is accurate.

## 2021 Tax Year

**Note: Personal copies of your federal tax return are NOT accepted.**

**✓ SUBMIT**

## 2021 IRS Tax Return Transcript

**Internal Revenue Service**  
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

**Tax Return Transcript**

Request Date: 03-04-201  
Response Date: 03-04-201  
Tracking Number: 109000070432

SSN Provided:  
Tax Period Ending: **Dec. 31, 2021**

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: 000-00-0100      SPOUSE SSN: 000-00-0200  
NAME(S) SHOWN ON RETURN: JOHN DOE & JANE DEE  
ADDRESS: 300 ANYSTREET BLVD DALLAS, TX 77000-0000-000

FILING STATUS: Married Filing Joint  
FORM NUMBER: 1040  
CYCLE POSTED: 20091408  
RECEIVED DATE:  
REMITTANCE: 0.00  
EXEMPTION NUMBER: 5  
DEPENDENT 1 NAME CTRL: ABGR  
DEPENDENT 1 SSN: 000-00-0300  
DEPENDENT 2 NAME CTRL: ABGS  
DEPENDENT 2 SSN: 000-00-0400  
DEPENDENT 3 NAME CTRL: ABGS  
DEPENDENT 3 SSN: 000-00-0500  
DEPENDENT 4 NAME CTRL:  
DEPENDENT 4 SSN:  
PREPARER SSN:  
PREPARER EIN:

**Income**

WAGES, SALARIES, TIPS, ETC:	\$ 67,000.00
TAXABLE INTEREST INCOME: SCH B:	\$ 0.00
TAX-EXEMPT INTEREST:	\$ 0.00
ORDINARY DIVIDEND INCOME: SCH B:	\$ 0.00
QUALIFIED DIVIDENDS:	\$ 0.00
REFUNDS OF STATE/LOCAL TAXES:	\$ 0.00
ALIMONY RECEIVED:	\$ 0.00
BUSINESS INCOME OR LOSS (Schedule C):	\$ 0.00
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:	\$ 0.00
CAPITAL GAIN OR LOSS: (Schedule D):	\$ 0.00
CAPITAL GAINS OR LOSSES: SCH D PER COMPUTER:	\$ 0.00
OTHER GAINS OR LOSSES (Form 4797):	\$ 0.00
TOTAL IRA DISTRIBUTIONS:	\$ 0.00
TAXABLE IRA DISTRIBUTIONS:	\$ 0.00

**✗ DO NOT SUBMIT**

## IRS Form 1040

**1040** Department of the Treasury - Internal Revenue Service (990) **2021** OMB No. 1545-0074 (80 Use Only - Do not write or staple in this space)

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  Qualifying widow(er) (QW)  
Check only if you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent.

Your first name and middle initial: \_\_\_\_\_ Last name: \_\_\_\_\_ Your social security number: \_\_\_\_\_  
If joint return, spouse's first name and middle initial: \_\_\_\_\_ Spouse's social security number: \_\_\_\_\_

Home address (number and street): \_\_\_\_\_ Apt. no.: \_\_\_\_\_ Presidential Election Campaign  
City, town, or post office: \_\_\_\_\_ State: \_\_\_\_\_ ZIP code: \_\_\_\_\_ If you are filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.  
Foreign country name: \_\_\_\_\_ Foreign province/state/country: \_\_\_\_\_ Foreign postal code: \_\_\_\_\_  Yes  No

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?  Yes  No

**Standard Deduction**  You as a dependent  Your spouse as a dependent  Spouse filer on a separate return or you were a dual-status alien

**Age/Blindness:** You:  Was born before January 2, 1957  Are blind  Spouse:  Was born before January 2, 1957  Is blind

**Dependents** (see instructions):

Dependent	(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Child tax credit	(5) Credit for other dependents
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12a						
12b						
13						
14						
15						

**1** Wages, salaries, tips, etc. Attach Form(s) W-2 **1**  
**2a** Tax-exempt interest **2a**  
**3** Qualified dividends **3b** Taxable interest **3b**  
**4a** IRA distributions **4b** Ordinary dividends **4b**  
**5a** Pensions and annuities **5b** Taxable amount **5b**  
**6a** Social security benefits **6b** Taxable amount **6b**

**7** Capital gain or (loss). Attach Schedule D if required. If not required, check here **7**  
**8** Other income from Schedule 1, line 10 **8**  
**9** Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** **9**  
**10** Adjustments to income from Schedule 1, line 20 **10**  
**11** Subtract line 10 from line 9. This is your **adjusted gross income** **11**

**12a** Standard deduction or itemized deductions (from Schedule A) **12a**  
**12b** Charitable contributions if you take the standard deduction (see instructions) **12b**  
**13** Qualified business income deduction from Form 8995 or Form 8995-A **13**  
**14** Add lines 12a and 13 **14**  
**15** Taxable income. Subtract line 14 from line 11. If zero or less, enter -0- **15**

**16** Tax (see instructions). Check if any from Form(s) 1  8014  4972  **16**  
**17** Amount from Schedule 2, line 3 **17**  
**18** Nonrefundable child tax credit or credit for other dependents from Schedule 8812 **18**  
**19** Amount from Schedule 3, line B **19**  
**20** Add lines 16 and 19 **20**  
**21** Subtract line 20 from line 18. If zero or less, enter -0- **21**  
**22** Other taxes, including self-employment tax, from Schedule 2, line 21 **22**  
**23** Add lines 22 and 23. This is your **total tax** **23**  
**24** Federal income tax withheld from:  
a Form(s) W-2 **24a**  
b Form(s) 1099 **24b**  
c Other forms (see instructions) **24c**  
d Add lines 24a through 24c **24d**  
**25** 2021 estimated tax payments and amount applied from 2020 return **25**  
**26** Earned income credit (EIC) **26a**  
Check here if you were born after January 1, 1998, and before January 3, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18 to claim the EIC. (See instructions.) **26a**  
a Prior year 2019 earned income **26a**  
b Nonrefundable combat pay election **26b**  
**27** Refundable child tax credit or additional child tax credit from Schedule 8812 **27**  
**28** American opportunity credit from Form 8863, line 8 **28**  
**29** Recovery rebate credit. See instructions. **29**  
**30** Amount from Schedule 3, line 10 **30**  
**31** Add lines 27a and 29 through 31. These are your **total other payments and refundable credits** **31**  
**32** Add lines 25a, 26, and 30. These are your **total payments** **32**  
**33** If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid** **33**  
**34** Amount of line 34 you want **refunded** to you. If Form 8868 is attached, check here **34**  
**35** Rounding number **35**  Yes  No  Checking  Savings **35**  
**36** Amount of line 34 you want applied to your 2022 estimated tax **36**  
**37** Amount you owe. Subtract line 33 from line 24. For details on how to pay, see instructions **37**  
**38** Estimated tax penalty (see instructions) **38**

**Refund** **34**  
**35** **36**  
**37**  
**38**

**Amount You Owe** **37**  
**38**

**Third Party Designee**  
Do you want to allow another person to discuss this return with the IRS? See instructions.  Yes. Complete below.  No

Designee's name: \_\_\_\_\_ Phone: \_\_\_\_\_ Period of authorization: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Your occupation: \_\_\_\_\_  
If the IRS asks you an identity protection question, enter a PIN (see instructions) **39**  
If the IRS asks you a question on security protection (2021), enter a PIN (see instructions) **40**

**Sign Here**  
Under penalties of perjury, I declare that I prepared this return and accompanying schedule and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.  
Taxpayer's signature: \_\_\_\_\_ Date: \_\_\_\_\_ Your occupation: \_\_\_\_\_  
If you are a preparer, enter a PIN (see instructions) **41**  
If you are a preparer, enter a PIN (see instructions) **42**

**Paid Preparer Use Only**  
Preparer's name: \_\_\_\_\_ Preparer's signature: \_\_\_\_\_ Date: \_\_\_\_\_ PIN: \_\_\_\_\_ Check if:  Self-employed  Not self-employed  
Phone no.: \_\_\_\_\_ Fax no.: \_\_\_\_\_  
Use only on a government form for instructions and the latest information. Form 1040 (2021)

Details on ordering an IRS Tax Return Transcript: [www.hesaa.org/Documents/RequestIRSTRT.pdf](http://www.hesaa.org/Documents/RequestIRSTRT.pdf)

Order an IRS Tax Return Transcript online: [www.irs.gov](http://www.irs.gov)

Order IRS Transcripts by mail: <https://sa.www4.irs.gov/irfof-tra/login>

Order an IRS Tax Return Transcript by phone: 1-800-908-9946

**Note:**

- ✓ If the value on **line 5** of IRS Schedule 1-Form 1040 is from rental property, other real estate and/or from renting part of the home, submit mortgage statement(s) showing the unpaid mortgage balances from mortgage holders as of 12/31/2022.
- ✓ If the value on **line 5** of IRS Schedule 1-Form 1040 is from a business (Partnership/S Corporation), submit all pages and schedules of the 2021 federal business return including Schedule L (balance sheet), Schedule K-1(s) and form 8825. If the business has rental property or owns property, submit mortgage statement(s) showing the unpaid mortgage balances from mortgage holders as of 12/31/2022. Submit a written statement listing the addresses of all rental properties if form 8825 is unavailable.

**✓ In addition to the 2021 IRS Tax Return Transcript, submit a copy of both Schedule 1 and Schedule E if there is a value on line 5 of your 2021 IRS Schedule 1- Form 1040**

**Submit: Schedule E pg1**

Income or Loss from Rental Real Estate and Royalties

**Schedule E pg2**

Income or Loss from Partnerships and S Corporations, Estates and Trusts or Real Estate Mortgage Investment Conduits

**Submit: 2021 IRS Schedule 1**

**If there is a value on line 5, submit a copy of both Schedule 1 and Schedule E along with 2021 IRS Tax Return Transcript**