



## D. Tax Filing Status and Income Information

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| <b>STUDENT:</b>                      |  | <b>SPOUSE (if married):</b>          |  |
|--------------------------------------|--|--------------------------------------|--|
| <b>1) Check one of the following</b> |  | <b>2) Check one of the following</b> |  |
| <input type="checkbox"/>             | I filed a 2021 Federal Tax Return and used the Data Retrieval Tool (DRT)   | <input type="checkbox"/>             | My spouse filed a 2021 Federal Tax Return and used the Data Retrieval Tool (DRT)   |
| <input type="checkbox"/>             | I filed a 2021 Federal Tax Return and DID NOT use the DRT *  | <input type="checkbox"/>             | My spouse filed a 2021 Federal Tax Return and DID NOT use the DRT *  |
| <input type="checkbox"/>             | I was not employed and had no earned income in 2021 and did not file a 2021 Federal Tax Return.**  | <input type="checkbox"/>             | My spouse was not employed and had no earned income in 2021 and did not file a 2021 Federal Tax Return.**  |
| <input type="checkbox"/>             | I did not file a 2021 Federal Tax Return but did work and/or have earned income and have included W-2(s) and listed income below. **<br><br>Income: \$ _____ | <input type="checkbox"/>             | My spouse did not file a 2021 Federal Tax Return but did work and/or have earned income and have included W-2(s) and listed income below. **<br><br>Income: \$ _____ |

**\*All tax filers must submit a 2021 Federal Tax Return Transcript or use the IRS Data Retrieval Tool within the FAFSA.**

The easiest way is going online and filling out the electronic form at [www.irs.gov](http://www.irs.gov) under 'Tools' select/click 'Get a Tax Transcript' then under item '3' select the electronic form. Or telephone 1-800-908-9946, this may take longer.

**\*\*Student/Spouse that didn't file a 2021 federal tax return must submit a Verification of Non-Filing Letter from the IRS.**

The easiest way is going online and filling out the electronic form at [www.irs.gov](http://www.irs.gov) under 'Tools' select/click 'Get a Tax Transcript' then select to 'Get transcript online'. You can also complete the Form 4506-T and send it in to the IRS to request this.

## E. Certification and Signatures

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*By signing this form, I affirm that all information on this form and any attachments are complete and accurate to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that if I purposely give false or misleading information on this worksheet it may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.*

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Student Signature

Date

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Spouses Signature (if applicable)

Date

*Submit this worksheet to:  
Lourdes Financial Aid Office  
6832 Convent Blvd. Sylvania, Ohio 43560  
Phone: 419-824-3732 Fax: 419-517-8921  
Email: [financialservices@lourdes.edu](mailto:financialservices@lourdes.edu)*