



### **Section 3 – Student/Spouse Income Information (Please read instructions before completing)**

Check only **ONE** box in **either A or B**.

- A. If you and spouse (if married) **filed** a 2021 federal tax return, check one box in Section A.
- B. If you and/or spouse **did not file** a 2021 federal tax return, complete Section B for Non-Tax Filer.

#### **A. 2021 Student/Spouse Tax Filer**

I already completed the **FAFSA IRS Data Retrieval (DRT)** process. For more information on how to complete the DRT process: [uwm.edu/taxes](http://uwm.edu/taxes).

I have attached my 2021 IRS Tax Return Transcript **or a SIGNED** copy of 2021 Federal Tax Return **including Schedules 1, 2, and 3 if applicable**.

I filed a **2021 amended return (1040X)**, have an extension, filed a foreign tax return, or cannot obtain a tax transcript due to IRS identity theft.

- If you amended your return, we would need a copy of your **SIGNED** 2021 IRS **1040X** including schedules 1, 2, and 3 if applicable or an IRS Record of Account Transcript that can be obtained at IRS.gov. We also need a copy of your **ORIGINAL SIGNED** 2021 federal tax return (before it was amended) including schedules 1, 2, and 3 if applicable.
- If you were a victim of identity theft, go to [uwm.edu/taxes](http://uwm.edu/taxes) for documentation you will need to provide to us.

#### **B. 2021 Student/Spouse Non-Tax Filer**

Check only **ONE** box below **if you (and/or spouse if married) did not file** a 2021 federal tax return. **\*Note, you must also submit an IRS Verification of Non-filing letter. Instructions on how to obtain this can be found here: [uwm.edu/taxes](http://uwm.edu/taxes).**

I did not earn any income from work in 2021.

I did earn income from work in 2021. I did not and was not required to file a 2021 Federal Income Tax Return per the IRS. **You must list all income** sources/amounts below and attach all 2021 W-2 and 1099 MISC forms.

<b>Individual's Name</b>	<b>Name of Employer</b>	<b>Income in 2021</b>

I did earn income from work in 2021, but do not have any W-2s or 1099 MISC form(s) (Ex. babysitting job, lawn job). I certify that I am not considered self-employed, and I did not and was not required to file a tax return.

<b>Individual's Name</b>	<b>Name of Employer/Job Performed</b>	<b>Income in 2021</b>

### **Section 4 – Student and Spouse (if married) Signatures**

By signing this worksheet, I/we certify the information reported is correct to the best of our knowledge. If the Department of Financial Aid notices a discrepancy, I/we understand corrections to the FAFSA will be submitted directly to the U.S. Department of Education. Additionally, I/we understand that any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2023-24 academic year.

**Student Signature**

**Date**

**Spouse Signature (Optional)**

**Date**

**NOTE: Signatures cannot be typed or stamped. Must be signature.**

**This form is only required if you completed Section 3-B but were unable to obtain a Verification of Non-Filing Letter directly from the IRS**

### **Verification of Non-Filing Worksheet**

Individuals who **did not file** a federal tax return are required to obtain a verification of non-filing letter from the IRS. **However**, if you and/or your spouse were unable to obtain a verification of non-filing letter from the IRS, you can complete the information below certifying that:

- You and/or your spouse attempted to obtain a verification of non-filing letter from the IRS, but were unsuccessful; **and**
- You and/or your spouse have not and were not required to file a federal income tax return for 2021.

If a non-filer had earnings from work, W-2s from each source of income must be provided.

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### **2023-24 Non-Filing Statement**

Student Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

I \_\_\_\_\_ certify that I attempted to obtain a verification of non-filing  
**(Non-Filer's Printed Name)**

letter from the IRS by the following means (please mark only **ONE** box):

I attempted to obtain a verification of non-filing letter from the IRS by submitting [IRS form 4506-T](#) to the IRS. I waited at least 10 days and have not received a response back.

I certify that I do not have a Social Security Number, a Taxpayer Identification Number, or an Employer Identification Number, therefore am unable to request a non-filing letter from the IRS.

Other (please explain your attempt to obtain the non-filing letter):

\_\_\_\_\_  
\_\_\_\_\_

### **AND**

Please check **ONE** of the following below:

I certify that I did not file and was not required to file a 2021 federal income tax return. I was not employed in 2021. I did not earn any income in 2021 and have no W-2s to provide.

I certify that I did not file and was not required to file a 2021 federal income tax return. Listed below is information about the income I earned in 2021, along with **attached copies of 2021 W-2s from each source of employment income**:

<b>Individual's Name</b>	<b>Name of Employer</b>	<b>Income Earned in 2021</b>

Non-Filer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**NOTE: Signatures cannot be typed or stamped. Must be signature.**