



The Authority on Financial Aid

2022-2023 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.

2020 Tax Year

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

SUBMIT

2020 IRS Tax Return Transcript

Internal Revenue Service
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Tax Return Transcript

Request Date: 03-04-20
Response Date: 03-04-20
Tracking Number: 10000070432

SSN Provided: _____
Tax Period Ending: **Dec. 31, 2020**

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 LOSS: 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 2020 OMB No. 1545-0047 833 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 Spouse benefits on a separate return or you were a dual-status alien

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

Home address number and street, if you have a P.O. box, see instructions. Apt. no. _____ **Presidential Election Campaign**
Check box if you, or your spouse if filing jointly, want \$3 to go to the fund. Checking a box below will not change your tax or refund.

City, town, or post office, if you have a foreign address, also complete spaces below. State _____ ZIP code _____
Foreign country name _____ Foreign province/state/county _____ Foreign postal code _____ Yes No

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No

Standard Deduction Someone can claim: You as a dependent Your spouse as a dependent
 Spouse benefits on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1956 Are blind Spouse: Was born before January 2, 1956 Is blind

Dependents (see instructions): (W) First name _____ Last name _____ (R) Social security number _____ (S) Relationship to you _____ (H) If qualified for (see instructions) _____
If more than four dependents, see instructions and check here _____

Attach	1. Wages, salaries, tips, etc. Attach Form(s) W-2		2a. Taxable interest		2b. Taxable interest		2c. Taxable interest
Sub. if required.	3a. Qualified dividends	3b. Ordinary dividends	4a. Taxable amount	4b. Taxable amount	5a. Taxable amount	5b. Taxable amount	6. Taxable amount
7. Capital gain or loss. Attach Schedule D if required. If not required, check here <input type="checkbox"/>	8. Other income from Schedule 1, line 9	9. Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	10a. Adjustments to income	10b. Adjustments to income	11. Subtract line 10c from line 9. This is your adjusted gross income	12. Standard deduction or itemized deduction from Schedule A	13. Qualified business income deduction. Attach Form 8969 or Form 8969-A
14. Add lines 12 and 13	15. Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	16. Tax (see instructions). Check if any from Form(s) 1041, 1041-2, 43702, or 43702-2	17. Amount from Schedule 2, line 3	18. Add lines 16 and 17	19. Child tax credit or credit for other dependents	20. Amount from Schedule 3, line 7	21. Add lines 19 and 20
22. Subtract line 21 from line 18. If zero or less, enter -0-	23. Other taxes, including self-employment tax, from Schedule 2, line 10	24. Add lines 22 and 23. This is your total tax	25. Federal income tax withheld from: a. Form(s) W-2 b. Form(s) 1099 c. Other forms (see instructions)	26. Add lines 25a through 25c	27. Earned income credit (EIC)	28. Additional child tax credit. Attach Schedule 8812	29. American opportunity credit from Form 8863, line 8
30. Refundable rebate credit. See instructions	31. Amount from Schedule 3, line 13	32. Add lines 27 through 31. These are your total other payments and refundable credits	33. Add lines 26c, 28, and 32. These are your total payments	34. If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	35a. Amount of line 34 you want refunded to you. If Form 8863 is attached, check here <input type="checkbox"/>	35b. Amount of line 34 you want applied to your 2021 estimated tax	36. Amount of line 34 you want applied to your 2021 estimated tax
37. Subtract line 35a from line 24. This is the amount you owe now. Note: Schedules 14 and Schedule 8812, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12c, and its instructions for details.	38. Estimated tax penalty (see instructions)	39. Total tax	40. Do you want to allow another person to discuss this return with the IRS? <input type="checkbox"/> Yes <input type="checkbox"/> No. Complete below: <input type="checkbox"/> Yes <input type="checkbox"/> No	41. Signature of preparer	42. Date	43. Signature of taxpayer	44. Date

Sign Here
Under penalties of perjury, I declare that I have examined this return and accompanying schedules 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.

Preparer's name _____ Date _____ Preparer's occupation _____
If the IRS sent you an identity protection PIN, enter it here (see next page) _____
If the IRS sent your dependent an identity protection PIN, enter it here (see next page) _____

Paid Preparer Use Only
Preparer's name _____ Preparer's signature _____ Date _____ PPA# _____ Check if Self-employed
Preparer's EIN _____

Details on ordering an IRS Tax Return Transcript: www.hesaa.org/Documents/RequestIRSTRT.pdf

Order an IRS Tax Return Transcript online: 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 12/31/2021.
- ✓ 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 2020 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 12/31/2021. Submit a written statement listing the addresses of all rental properties if form 8825 is unavailable.

✓ **In addition to the 2020 IRS Tax Return Transcript, submit a copy of both Schedule 1 and Schedule E if there is a value on line 5 of your 2020 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: 2020 IRS Schedule 1

If there is a value on line 5, submit a copy of both Schedule 1 and Schedule E along with 2020 IRS Tax Return Transcript