

MOORPARK • OXNARD • VENTURA FINANCIAL AID OFFICE

HOW TO SUBMIT TAX INFORMATION TO THE FINANCIAL AID OFFICE:

Form 1040 Department of the Treasury—Internal Revenue Service (99) 2013 CHS No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1-Dec. 31, 2013, or other tax year beginning 2013, ending 2013

1 Last name and initial Last name Your social security number

2 If a joint return, spouse's first name and initial Last name Spouse's social security number

3 Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Make sure ZIP code is correct.

4 City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).

5 Foreign country name Foreign province/state/county Foreign postal code

6 Filing Status: 1 ☐ Single 2 ☐ Married filing jointly (even if only one had income) 3 ☐ Married, filing separately. Enter spouse's SSN above and full name here. 4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter the child's name here. 5 ☐ Qualifying widow(er) with dependent child

7 Exemptions: a ☐ Yourself. Someone can claim you as a dependent, do not check box 6a. b ☐ Spouse. c ☐ Dependents: (i) First name Last name (ii) Dependent's social security number (iii) Dependent's relationship to you (iv) Under age 17 (v) Student (vi) Child under age 17 (vii) Other (viii) Child for credit (see instructions)

8 Income: 7 Wages, salaries, tips, etc. Attach Form W-2. 8a Taxable interest. Attach Schedule B if required. 8b Tax-exempt interest. Do not include on line 8b. 9a Ordinary dividends. Attach Schedule C or C-E if required. 9b Qualified dividends. Attach Schedule C or C-E if required. 10 Taxable refunds, credits, or offsets of state and local income taxes. 11 Alimony received. 12 Business income (or loss). Attach Schedule C or C-E if required. 13 Capital gain or (loss). Attach Schedule D if required. If married, check here ☐ 14 Other gains or (losses). Attach Form 4797. 15a IRA distributions. 15b Rollover amount. 16a Pensions and annuities. 16b Taxable amount. 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E. 18 Farm income (or loss). Attach Schedule F. 19 Unemployment compensation. 20a Social security benefits. 20b Taxable amount. 21 Other income (type and amount). 22 Combine amounts in the far right column for lines 7 through 21. This is your total income.

23 Adjusted Gross Income: 23 Educational expenses. 24 Certain business expenses of reservists, performing artists, and fee-based government officials. Attach Form 2106 or 2106-EZ. 25 Savings account deduction. Attach Form 8889. 26 Moving expenses. Attach Form 3903. 27 Deductible part of self-employment tax. Attach Schedule SE. 28 Self-employed SEP, SIMPLE, and qualified plans. 29 Self-employed health insurance deduction. 30 Penalty on early withdrawal of savings. 31a Alimony paid. b Recipient's SSN. 32 IRA deduction. 33 Student loan interest deduction. 34 Tuition and fees. Attach Form 8917. 35 Domestic production activities deduction. Attach Form 8803. 36 Add lines 23 through 35. 37 Subtract line 36 from line 22. This is your adjusted gross income.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 112008 Form 1040 (2013)

The Financial Aid Office cannot accept the IRS forms 1040, 1040A, or 1040EZ.

You must either use the IRS Data Retrieval Tool on the FAFSA or submit an IRS Tax Return Transcript to the Financial Aid Office to verify tax information.

Parent Tax Information

For 2013, have your parents completed their IRS income tax return or another tax return?

For 2013, what is your parents' tax filing status according to their tax return?

You, the parents, may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS.

Did you, the parents, file an amended tax return?

☐ Yes ☒ No

Did you, the parents, file a Puerto Rican or foreign tax return?

☐ Yes ☒ No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

☐ Yes ☒ No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA.

Enter your PIN and click [Link To IRS](#).

Which parent are you?

What is your PIN?

[Apply For A PIN](#)
[I Forgot/Don't Know My PIN](#)

[LINK TO IRS](#)

Internal Revenue Service United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Tax Return Transcript

SSN Provided: 000-00-0100
Tax Period Ending: Dec. 31, 2008

Request Date: 03-04-2009
Response Date: 03-04-2009
Tracking Number: 100000070432

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: 200 ANYSTREET BLVD
DALLAS, TX 77000-0000-000

FILING STATUS: Married Filing Joint
FORM NUMBER: 1040
CYCLE POSTED: 20091408
RECEIVED DATE: Feb. 15, 2009
REMITTANCE: 0.00
EXEMPTION NUMBER: 5
DEPENDENT 1 NAME CTRL: ABGR
DEPENDENT 1 SSN: 000-00-0300
DEPENDENT 2 NAME CTRL: ABGR
DEPENDENT 2 SSN: 000-00-0400
DEPENDENT 3 NAME CTRL: ABGR
DEPENDENT 3 SSN: 000-00-0500
DEPENDENT 4 NAME CTRL:
DEPENDENT 4 SSN:
PREPARED BY:
PREPARED EID:

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
TOTAL PREPARED BY: \$ 0.00

MOORPARK • OXNARD • VENTURA FINANCIAL AID OFFICE



TAX RETURN TRANSCRIPT ONLINE REQUEST

- ✓ Visit the IRS Web site at www.irs.gov
- ✓ In the **TOOLS** section of the homepage click “**Get Transcript of Your Tax Records**”.
- ✓ Click “**Get Transcript Online**”.
- ✓ You will need to create an account if you have not done so before.
- ✓ After Step 1 is completed, you will need to access the email account provided during Step 1 to be able to click on the confirmation link.

Note: Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed.

- ✓ After you have successfully set up your account, select the “**Return Transcript**”. **The 2014-2015 FAFSA will require “2013”.**
- ✓ The transcript you have requested will open in a new window.



[Sign Out](#)

Get Transcript

Please select the reason you are requesting a transcript to help us determine the appropriate transcript for your needs.

- | | | |
|--|---|--|
| <input type="radio"/> Higher Education/Student Aid | <input type="radio"/> FEMA/Disaster Related | <input type="radio"/> State or Local Tax Issue |
| <input type="radio"/> Mortgage Related | <input type="radio"/> State Licensing | <input type="radio"/> Income Verification |
| <input type="radio"/> Federal Tax | <input type="radio"/> Small Business Loan | <input type="radio"/> Health Care |
| <input type="radio"/> Immigration | <input type="radio"/> Housing Assistance | <input type="radio"/> Other |

Below are the transcripts and years available.

Return Transcript

[2013*](#) [2012](#) [2011](#) [2010](#)

Record of Account Transcript

N/A [2012](#) [2011](#) [2010](#)

Account Transcript

N/A [2012](#) [2011](#) [2010](#) [2009](#) N/A N/A N/A N/A N/A

Wage & Income Transcript

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#)

* The “Verification of Non-Filing” letter provides proof from the IRS that you did not file a return for the year you have selected.

MOORPARK • OXNARD • VENTURA FINANCIAL AID OFFICE



TELEPHONE REQUEST

- ✓ Call the IRS at **1-800-908-9946**
- ✓ Follow prompts to enter the social security number and the numbers in the street address. Generally this will be numbers of the street address that were listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- ✓ Select **“Option 2”** to request an IRS Tax Return Transcript and enter the appropriate aid year **“2013”**.
- ✓ If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days.
- ✓ IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.



MAIL REQUEST

- ✓ Use IRS Form 4506T-EZ, downloaded at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- ✓ Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4.
- ✓ On line 6, enter the appropriate aid year **“2013”**
- ✓ The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- ✓ Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- ✓ Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.



IN-PERSON REQUEST

***Please attempt to request the transcript online before visiting the IRS Office.
Assistance is available in the Financial Aid Computer Lab.***

- ✓ Visit 751 Daily Drive Suite #101, Camarillo, CA
 - ✓ Request a **Tax Return Transcript** for the appropriate aid year.
- Phone: (800) 829-1040