

Student's Name:

ID#:

(Step 3, Part 2 Continued) Student Nontax Filer Only

Sources/Employer's Name	2016 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (example)
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Check here if you need additional space and are attaching a separate page that includes the student's name & ID number.

Step 4 – Verification of 2016 Income Information for the Student's Spouse Tax Filer (*If the student's spouse will not file and is not required to file a 2016 income tax return with the IRS skip Step 4 and continue to Step 5. *If no spouse is listed on Step 1 of this worksheet skip to the signature certification.)

Important Note — Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Check only one box below: (Please note, an IRS Tax Return Transcript is different than a copy of your tax return.)

- The student's spouse has used the Data Retrieval Tool through FAFSA. Date used: _____
- The student's spouse has attached a 2016 IRS Tax Return Transcript or has requested it from the IRS. Date requested: _____
- The student's spouse has not yet filed a 2016 federal tax return and will be filing at a later date. By checking this box, I, the student, understand that I will still need to provide my and/or my spouse's 2016 federal tax & income information by using one of the methods above.

Step 5 – Verification of 2016 Income Information for Student's Spouse Nontax Filer (*If the student's spouse filed or will file a 2016 income tax return with the IRS skip Step 5 and continue to the signature certification. *If no spouse is listed on Step 1 of this worksheet skip to the signature certification.)

Important Note — Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Part 1. Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2016 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. Confirmation of non-filing can be obtained from the IRS. Please refer to instructions on requesting IRS confirmation of non-filing status.

- Check here if IRS confirmation of non-filing is provided.
- Check here if IRS confirmation of non-filing will be provided later. Date requested: _____

Part 2. Check only one box below:

- The student's spouse was not employed and did not earn income in 2016.
- The student's spouse earned income from work in 2016, but will not file and is not required to file a 2016 Federal Income Tax Return. List below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form. ***Provide copies of all 2016 IRS W-2 forms issued to the student's spouse by their employers.**

Sources/Employer's Name	2016 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (example)
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Check here if you need additional space and are attaching a separate page that includes the student's name & ID number.

Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and the spouse (optional) must sign and date. (Please print the form to provide a signature.)

Student's Signature (Required) Date

Spouse's Signature (Optional) Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Please submit this worksheet to
Montana Tech, Attn: Financial Aid
1300 W Park St, Butte, MT
or fax to 406-496-4705

You should make a copy of this worksheet for your records