



# Sam Houston State University Financial Aid and Scholarships Office

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

## INCOME TAX WORKSHEET 2023-2024

If you make any corrections, white outs, or alterations to any of your information on this form, you MUST initial next to it.

Student Name (blue or black ink only): Sammy Bearkat SAM ID: 000123456

Incomplete verification packets will NOT be accepted.

### SECTION A: STUDENT SECTION

Did the STUDENT/STUDENT'S SPOUSE file a 2021 tax return with the IRS?

**Must choose one:**

- Already filed a tax return
- Worked but will not file a tax return.
  - **Must attach All W-2's/1099's/Schedule C's AND**
  - **Independent students must** attach a Verification of Non-Filing Letter from IRS
- Did not work. Must attach:
  - **Independent students must** attach a Verification of Non-Filing Letter from IRS

### SECTION B: PARENT SECTION

Did the PARENT(S) file a 2021 tax return with the IRS? **Must choose one:**

- Already filed a tax return
- Worked but will not file a tax return. Must attach:
  - All W-2's/1099's/Schedule C's AND
  - Verification of Non-Filing Letter from IRS
- Did not work. Must attach:
  - Verification of Non-Filing Letter from IRS

Options on how to link taxes to the FAFSA, obtain a Tax Return Transcript, Wage & Income Transcript, or Verification of Non-Filing letter from IRS:

<b>IRS Data Retrieval Tool:</b> Link 2021 taxes to FAFSA by using the IRS Data Retrieval Tool on <a href="http://www.fafsa.ed.gov">www.fafsa.ed.gov</a> .	<b>Request Online:</b> Visit <a href="http://www.irs.gov">www.irs.gov</a> and click "Get Your Tax Record."	<b>Order by Phone:</b> Call 1-800-908-9946	<b>In Person:</b> Visit your local IRS office. <a href="http://www.irs.gov">www.irs.gov</a> to search locations.	<b>By Mail:</b> Complete form 4506-T <i>*This form can also be used to obtain a Verification of Non-Filer Letter from the IRS. Note the 4506-T is submitted to IRS, not Financial Aid and Scholarships Office.</i>
<b>If you filed an amended tax return (1040X) provide the following:</b> <ul style="list-style-type: none"> <li>➤ Signed copy of 1040X</li> <li>➤ Original Tax Return Transcript</li> </ul>			<b>If you are a victim of tax identity theft who is unable to obtain a 2021 Tax Return Transcript you must contact the IRS at 1-800-908-4490.</b>	

**WARNING:** If you purposely give false or misleading information you may be fined, sentenced to jail, or both. Each person signing below certifies that all of the information is complete and correct.

Student Signature: Sammy Bearkat Date: 08/01/23

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_



**FONT SIGNATURES NOT ACCEPTED**

Return completed form to: Financial Aid and Scholarships Office  
 Email: PDF from SHSU Email to [fadocuments@shsu.edu](mailto:fadocuments@shsu.edu) • Fax: 936.294.3668  
 Mail: Box 2328, Huntsville TX 77341-2328