



NORTHWESTERN UNIVERSITY
OFFICE OF FINANCIAL AID
1801 HINMAN AVENUE, 2ND FLOOR
EVANSTON, IL 60208-1270

2012-2013 TAX STATUS FORM

The Department of Education is encouraging all applicants to utilize the tax data retrieval process when completing the 2012-13 Free Application for Federal Student Aid (FAFSA). Northwestern is supporting this effort in order to reduce the need to obtain full tax copies from all families and eliminate reporting errors. You should use this form to inform our office if you are able to use the process. If you are not, you should also submit your tax copies to our office. Please be aware that if you are selected for a federal verification review and have not used the tax data retrieval process, you may be required to obtain an official tax transcript from the IRS.

A. Student Information:

Last Name	First Name	MI	NU Student ID Number

B. Parent FAFSA Information:

I completed the FAFSA prior to filing my taxes, but I used the tax data retrieval process to update my FAFSA.
Your tax information should be available to update your FAFSA approximately 2 weeks after you e-file your return or 6-8 weeks if you file a paper return. You will need to access your FAFSA information at www.fafsa.ed.gov to update your tax filing status and utilize the tax retrieval.

I completed the parent portion of the FAFSA using the tax data retrieval process.
If you had any income on your tax return from an IRA rollover or if you changed any of the data after the retrieval process, please outline in the Notes and Special Circumstances section below.

I was not given the option to use the tax data retrieval process on the FAFSA and am attaching a tax copy(s). My filing status is:

<input type="checkbox"/> Married, filing separately <input type="checkbox"/> Married, filing head of household <input type="checkbox"/> Non-filer, <i>complete C below</i>	<input type="checkbox"/> Filed Foreign Taxes (translated copy attached) <input type="checkbox"/> Filed Amended US Taxes <input type="checkbox"/> Other (List): _____
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C. Parent Income Information: (Non-Tax filers Only)

I did not and am not required to file a 2011 US Federal Income Tax Return.

If you earned income in 2011, but are not required to file a 2011 US Federal Tax Return, list your sources of income (both taxed and untaxed) and the amounts below. Attach any W-2 wage earnings forms and outline any untaxed income received, such as child support, living allowances, etc.

Source	Amount	Source	Amount
	\$		\$
	\$		\$
	\$		\$

D. Student FAFSA Information:

I completed the FAFSA prior to filing my taxes, but used the tax data retrieval process to update the FAFSA.

I completed the student section of the FAFSA using the tax data retrieval process.

E. Student Income Information: (Non-Tax filers Only)

I did not and am not required to file a 2011 US Federal Tax Return.

If you earned income in 2011, but are not required to file a 2011 US Federal Tax Return, list the sources of your income (both taxed and untaxed) and the amounts below.

Source	Amount	Source	Amount
	\$		\$
	\$		\$
	\$		\$

F. Notes and Special Circumstances

List reasons for making changes to the information on your FAFSA tax data retrieved or other information about your tax data that you would like the Financial Aid Committee to consider in determining financial aid eligibility. If any income on your tax return is from a rollover, please outline below and attach documentation.

Certification Statement: Each person signing this form certifies that all the information provided is accurate and complete. If requested, we agree to provide proof of information we have provided on this form. The student and at least one parent must sign.

Student Signature

Date

Parent Signature

Date