

## Submitting 2016 Federal Income Tax Returns and/or a Non-Filing Statement for Non-U.S. Citizens

- All tax returns, receipts, and extensions **must be signed by the tax filer.**
- Submit documents by fax, mail, email attachment or in person.**
- Include the **student name and 8-digit UMID number** at the top of the first page of the tax return(s).

- **If you filed a 2016 tax return:** When you apply for financial aid for the 2018-2019 academic year, you may be required to submit **signed copies** of 2016 federal income tax returns (1040s). You may be asked to submit tax returns for you and your spouse (*if you are married and your spouse filed separately, you must submit a signed copy of your spouse's federal income tax return.*) Tax returns are used to verify the information submitted on your financial aid application so your aid can be processed.
- **If you did not file a 2016 tax return:** If you and/or your spouse **are not or were not** required to submit federal income tax returns to the IRS (or to a foreign country's government) based on income requirements on the length of time in this country, complete the **Non-Filing Statement for Non-U.S. Citizens** below in lieu of tax return copies.

Because there are many types of tax returns, we've listed below information on which types are acceptable for submission:

1. **Federal Tax Returns:** All **signed copies** of 2016 paper tax returns and attached schedules are acceptable (1040, 1040NR, 1040NR-EZ or Form 8843). Be sure the return is signed by the **tax filer** in the "Sign Here" section even if it is already signed by a tax preparer.
2. **Foreign Tax Returns:** If you or your spouse filed a foreign tax return or a tax return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or the Republic of Palau, you must submit a copy of the **signed** 2016 tax return to our office. Currency must be converted to U.S. dollars (use a currency converter such as the one at [www.oanda.com/converter/classic](http://www.oanda.com/converter/classic)). If the fiscal year does not end in December 2016, we need a **signed copy** of your most recently filed tax return along with a letter from your employer or accountant stating your January 2016 through December 2016 earnings.
3. **Non-Filing Statement:** If you or your spouse are not or were not required to file a tax return based on income requirements established by the IRS (see chart on page 2), complete and **sign** the 2016 Non-Filing Statement below. Submit it by fax, mail or in person (do NOT send as an email attachment) to the Office of Financial Aid in lieu of tax return copies. Do NOT submit without ALL required signatures.

STUDENT'S NAME: LAST                      FIRST                      M.I.                      UMID NUMBER (8 DIGITS)                      EMAIL ADDRESS

This section must be completed by the student and/or the student's spouse if they **are not or were not** required to file a 2016 federal income tax return with the Internal Revenue Service (IRS) or to a foreign country's government.

List all sources and amounts of income received in 2016 and attach copies of available W-2 forms.

SOURCE OF INCOME (from work, child support, Social Security, etc.):

AMOUNT OF INCOME:

\_\_\_\_\_

\_\_\_\_\_

I am/we are not required to file 2016 federal income tax return(s).

STUDENT'S SIGNATURE

DATE

SPOUSE'S SIGNATURE

DATE

### 2016 FEDERAL INCOME TAX FILING REQUIREMENTS

<p>This information is from the 2016 IRS 1040 and 1040A Instruction Booklets (see <a href="http://www.irs.gov">www.irs.gov</a>).</p> <p>Amounts listed are for people under the age of 65; if you are over 65, please refer to the IRS instruction booklets.</p>	For most people, a tax return must be filed with the Internal Revenue Service (IRS) if their 2016 income was at least:			
	Single dependent student <i>(your parents or someone else can claim you as a dependent)</i>	\$6,300 (earned income)	Married, filing separately	\$4,050 (gross income)
	Single, if claiming self	\$10,350 (gross income)	Head of household	\$13,350 (gross income)
	Married, filing joint return	\$20,700 (gross income)	Qualifying widow(er) with dependent child	\$16,650 (gross income)