

2017-2018 Tax Extension Income Worksheet - Student

Student Name

LMU ID or SSN

The purpose of this form is for tax filers who have filed an extension with the IRS to submit the required income information to complete federal verification. Enter the adjusted gross income (AGI) that you expect to report on your 2016 federal tax return, considering earned income, business income (loss), rental income (loss) etc. from your financial records and anticipated adjustments against income. Make sure to submit copies of all W2s, and if no W2, a statement of why no W2 is available. The 2017-2018 FAFSA requires 2016 federal tax information which was due on April 18, 2017. Form 4868 granted automatic extension for six months, which expired October 16, 2017. Therefore, to submit 2016 tax extension documents after October 16, 2017, you will also need to submit an additional IRS document granting you an additional extension to file your 2016 federal return.

2016 INCOME AND RESOURCES	STUDENT
1. 1040 Type (1040, 1040A, or 1040EZ)	
2. For 2016, what is or will be your tax filing status according to their tax return?	
3. Total Earned Income/Wages (Submit W-2s for all income earned if no W-2 provide signed statement why no W-2 available)	\$
4. 2016 ADJUSTED GROSS INCOME (1040 line item 37, 1040A line item 21, 1040EZ line item 4)	\$
5. 2016 Tax Liability (Your estimate of 2016 tax liability reported on IRS form 4868)	\$
6. 2016 Untaxed Pensions (1040 line items 16a minus 16b; 1040A line items 12a minus 12b; 1040EZ is N/A)	\$
7. 2016 Untaxed IRA Deductions (1040 line items 15a minus 15b; 1040A line items 11a minus 11b; 1040EZ is N/A)	\$
8. 2016 Tax Exempt Interest Income (1040 line item 8b; 1040A line item 8b; 1040EZ is N/A)	\$
9. Education Credits (1040 line item 50; 1040A line item 33; 1040EZ is N/A)	\$

IRS Form 4868 or another IRS tax extension form attached.

Comments:

The information that I reported on this document is true, complete, and accurate to the best of my knowledge. I understand that any false statement or misrepresentations may be cause for denial, reduction, withdrawal and/or repayment of financial aid.

Federal law does not allow us to use a digital signature on this form. Please print out the form, sign it by hand, and return it to our office attached to an email as an image, by fax, or by mail. All forms must be legible in order to be accepted.

Student Signature _____

Date _____

**Mail: LMU Financial Aid Office
1 LMU Drive, Suite 270
Los Angeles, CA 90045**

**Phone: 310.338.2753
Fax: 310.338.2793**

Click the 'Submit by Email' button if you have an email client configured (eg: Outlook, Outlook Express, Entourage etc.) -OR- save the file to your computer and attach the file using your web-based email (AOL, Yahoo, Gmail, etc.) and send it to finaid@lmu.edu. Documents must be signed before they can be accepted.