

# 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 2015 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 2015 federal tax information which was due on April 18, 2016. Form 4868 granted automatic extension for six months, which expired October 17, 2016. Therefore, to submit 2015 tax extension documents for 2017-2018, you will also need to submit an IRS document granting you an additional extension to file your 2015 federal return.

2015 INCOME AND RESOURCES	STUDENT
<b>1. 1040 Type (1040, 1040A, or 1040EZ)</b>	
<b>2. For 2015, what is or will be your tax filing status according to their tax return?</b>	
<b>3. Total Earned Income/Wages</b> (Submit W-2s for all income earned if no W-2 provide signed statement why no W-2 available)	\$ <input style="width: 80%;" type="text"/>
<b>4. 2015 ADJUSTED GROSS INCOME</b> (1040 line item 37, 1040A line item 21, 1040EZ line item 4)	\$ <input style="width: 80%;" type="text"/>
<b>5. 2015 Tax Liability</b> (Your estimate of 2015 tax liability reported on IRS form 4868)	\$ <input style="width: 80%;" type="text"/>
<b>6. 2015 Untaxed Pensions</b> (1040 line items 16a minus 16b; 1040A line items 12a minus 12b; 1040EZ is N/A)	\$ <input style="width: 80%;" type="text"/>
<b>7. 2015 Untaxed IRA Deductions</b> (1040 line items 15a minus 15b; 1040A line items 11a minus 11b; 1040EZ is N/A)	\$ <input style="width: 80%;" type="text"/>
<b>8. 2015 Tax Exempt Interest Income</b> (1040 line item 8b; 1040A line item 8b; 1040EZ is N/A)	\$ <input style="width: 80%;" type="text"/>
<b>9. Education Credits</b> (1040 line item 50; 1040A line item 33; 1040EZ is N/A)	\$ <input style="width: 80%;" type="text"/>

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](mailto:finaid@lmu.edu). Documents must be signed before they can be accepted.