

2019-2020 Tax Extension Income Worksheet - Parent

Student Name **LMU ID or SSN**

Parent Name **Telephone**

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 2018 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 2019-2020 FAFSA requires 2018 federal tax information which is due on April 17, 2019. Form 4868 grants automatic extension for six months, which expires October 16, 2019. Therefore, to submit 2018 tax extension documents after October 16, 2019, you will also need to submit an additional IRS document granting you an additional extension to file your 2018 federal return.

2018 INCOME AND RESOURCES	PARENT(S)
1. 1040 Type (1040, 1040A, or 1040EZ)	<input style="width: 100%; height: 25px;" type="text"/>
2. For 2018, what is or will be your parents' tax filing status according to their tax return?	<input style="width: 100%; height: 25px;" type="text"/>
3. Total Earned Income/Wages (Submit W-2s for all income earned if no W-2 provide signed statement why no W-2 available)	\$ <input style="width: 90%; height: 25px;" type="text"/>
4. 2018 ADJUSTED GROSS INCOME (1040 line item 37, 1040A line item 21, 1040EZ line item 4)	\$ <input style="width: 90%; height: 25px;" type="text"/>
5. 2018 Tax Liability (Your estimate of 2017 tax liability reported on IRS form 4868)	\$ <input style="width: 90%; height: 25px;" type="text"/>
6. 2018 Untaxed Pensions (1040 line items 16a minus 16b; 1040A line items 12a minus 12b; 1040EZ is N/A)	\$ <input style="width: 90%; height: 25px;" type="text"/>
7. 2018 Untaxed IRA Deductions (1040 line items 15a minus 15b; 1040A line items 11a minus 11b; 1040EZ is N/A)	\$ <input style="width: 90%; height: 25px;" type="text"/>
8. 2018 Tax Exempt Interest Income (1040 line item 8b; 1040A line item 8b; 1040EZ is N/A)	\$ <input style="width: 90%; height: 25px;" type="text"/>
9. Education Credits (1040 line item 50; 1040A line item 33; 1040EZ is N/A)	\$ <input style="width: 90%; height: 25px;" 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. LMU reserves the right to request copies of actual tax transcripts from the IRS once a tax return has been filed.

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.

Parent Signature _____ Date _____

Parent Email _____

How to Submit this Form:

The Department of Education requires that documents containing personally identifiable information (PII) must be transmitted through secure means. This form cannot be submitted via email. You may mail or fax this form to the address or fax number listed to the left, or you may submit it as a PDF through our Secure Upload page available at financialaid.lmu.edu/upload

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

Phone: 310.338.2753
Fax: 310.338.2793

For Office Use Only:
RRAAREQ - TEXTP
Nolij - Tax Extension

FAO Staff Initial _____
Date: _____