Loyola Marymount University
Financial Aid

2021-2022 Tax Extension Income Worksheet - Parent

Please use black or blue ink while filling out this form.

Student Name _____ **LMU ID** _____

Parent Name _____ **Telephone** _____

The 2021-2022 FAFSA requires 2019 federal tax information which was due on July 15, 2020. The purpose of this form is for tax filers who have filed an extension with the IRS beyond the automatic six month extension. Enter the adjusted gross income (AGI) that you expect to report on your 2019 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.

You must submit a copy of the IRS's approval of your extension beyond the automatic six month extension for the 2019 tax year with this form.

2019 INCOME AND RESOURCES	PARENT(S)
1. For 2019, what is or will be your parents' tax filing status according to their tax return?	Married Filing Joint
2. Total Earned Income/Wages (Submit W-2s for all income earned if no W-2 provide signed statement why no W-2 available)	$
3. 2019 Adjusted Gross Income (1040 line item 8b)	$
4. 2019 Tax Liability (1040 line item 14 minus Schedule 2 line 2)	$
5. 2019 Untaxed Portions of IRA, Pension and Annuity Distributions (1040 line items 4a minus 4b PLUS line items 4c minus 4d)	$
6. 2019 Tax Exempt Interest Income (1040 line item 2a)	$
7. Education Credits (1040 Schedule 3, line 3)	$

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 _____

Print Form

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

Phone: **310.338.2753**
Fax: **310.338.2793**

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

For Office Use Only:
RRAAREQ - TEXTP
Etrieve - Tax Extension Form
Date _____
Staff Initial _____