

# 2018-2019 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 2017 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 2018-2019 FAFSA requires 2017 federal tax information which is due on April 17, 2018. Form 4868 grants automatic extension for six months, which expires October 16, 2018. Therefore, to submit 2017 tax extension documents after October 16, 2018, you will also need to submit an additional IRS document granting you an additional extension to file your 2017 federal return.

2017 INCOME AND RESOURCES	STUDENT
<b>1. 1040 Type (1040, 1040A, or 1040EZ)</b>	
<b>2. For 2017, 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)	\$
<b>4. 2017 ADJUSTED GROSS INCOME</b> (1040 line item 37, 1040A line item 21, 1040EZ line item 4)	\$
<b>5. 2017 Tax Liability</b> (Your estimate of 2016 tax liability reported on IRS form 4868)	\$
<b>6. 2017 Untaxed Pensions</b> (1040 line items 16a minus 16b; 1040A line items 12a minus 12b; 1040EZ is N/A)	\$
<b>7. 2017 Untaxed IRA Deductions</b> (1040 line items 15a minus 15b; 1040A line items 11a minus 11b; 1040EZ is N/A)	\$
<b>8. 2017 Tax Exempt Interest Income</b> (1040 line item 8b; 1040A line item 8b; 1040EZ is N/A)	\$
<b>9. Education Credits</b> (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 \_\_\_\_\_

### 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](http://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 - TEXTS  
Nolij - Tax Extension

FAO Staff Initial \_\_\_\_\_  
Date: \_\_\_\_\_