



# 2020-2021 Tax Extension Income Worksheet - Student

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

Student Name  LMU ID

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 2020-2021 FAFSA requires 2018 federal tax information which was due on April 15, 2019. Form 4868 grants an automatic extension for six months, which expired October 15, 2019. Therefore, to submit 2018 tax extension documents after October 15, 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	STUDENT
<b>1. For 2018, what is or will be your tax filing status according to your tax return?</b>	
<b>2. 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 type="text"/>
<b>3. 2018 ADJUSTED GROSS INCOME</b> (1040 line item 7)	\$ <input type="text"/>
<b>4. 2018 Tax Liability</b> (Your estimate of 2018 tax liability reported on IRS form 4868)	\$ <input type="text"/>
<b>5. 2018 Untaxed Portions of IRA, Pension and Annuity Distributions</b> (1040 line items 4a minus 4b)	\$ <input type="text"/>
<b>6. 2018 Tax Exempt Interest Income</b> (1040 line item 2a)	\$ <input type="text"/>
<b>7. Education Credits</b> (1040 Schedule 3, line item 50)	\$ <input 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 \_\_\_\_\_

### How to Submit this Form:

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

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

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)

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RRAAREQ - TEXTS  
Etrieve - Tax Extension

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