

SECTION C:**Tax Information****STUDENT'S TAX FORMS** *(Please check appropriate box)*

- I transferred my tax data to FAFSA using IRS Data Retrieval and did not change the data.
- I am attaching my IRS Tax Return Transcript with **my Name & ID# on each page**.
- I am attaching a signed copy of my 2021 federal tax return and schedules 1, 2, and 3 (if filed).
- I _____ (student's signature) did not file *and am not required to file a 2021 U.S. Income Tax Return* because:
- I did not work***
 - My 2021 earnings were less than the required amount to have to file. I have listed below each employer and the amount earned for 2021 & have attached the W-2 or 1099 for each. (Please complete the table below)***

LIST STUDENT'S EMPLOYER/S SUBMIT A COPY OF W-2/1099 FORM FROM EACH EMPLOYER	STUDENT'S AMOUNT EARNED FROM YOUR 2021 W-2/1099 FORM	W-2/1099 ATTACHED?

If no W-2 or 1099 was issued, you must provide a written explanation as to why no W-2 or 1099 was provided and why you can't request a copy from the IRS or the employer:

PARENT'S TAX FORMS *(Please check appropriate box)*

- I transferred my tax data to FAFSA using IRS Data Retrieval and did not change the data.
- I am attaching my IRS Tax Return Transcript(s) with **Student's Name & ID# on each page.**
- I am attaching a signed copy of my 2021 federal tax return and schedules 1, 2, and 3 (if filed).
- I _____ *(Parent's signature)* did not file *and am not required to file a 2021 U.S. Income Tax Return because:*
 - ***I/we did not work.***
 - ***I/We have also enclosed a Non-Filing Letter which was requested from the IRS using the IRS form found at (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).***
 - ***My/Our 2021 earnings were less than the required amount to have to file. I/We have listed below each employer and the amount earned for 2021 & have attached the W-2 or 1099 for each***
 - ***I/We have also enclosed a Non-Filing Letter which was requested from the IRS using the IRS form found at (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).***

LIST PARENT'S EMPLOYER/S SUBMIT A COPY OF W-2/1099 FORM FROM EACH EMPLOYER	PARENT'S AMOUNT EARNED FROM THEIR 2021 W-2/1099 FORM	W-2/1099 ATTACHED?

If no W-2 or 1099 was issued, you must provide a written explanation as to why no W-2 or 1099 was provided and why you can't request a copy from the IRS or the employer:

Each person signing this form certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

Student Signature Date

Parent Signature Date

Identity and Statement of Educational Purpose

(To Be Signed in person at UMW Financial Aid Office)

The student must appear in person at UM Western to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or U.S. passport.

The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. (ID copy Attached) _____ Staff's Initials

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending University of Montana Western for 2023-2024.

(Student's Signature)

(Date)

(Student's ID Number)

If you are unable to appear in person, please go to the UMW Financial Aid Website <https://www.umwestern.edu/wp-content/uploads/V4-Notary-Statement-of-Educational-Purpose-23-24.pdf> and complete the Notary Identity and Statement of Educational Purpose.

Please complete this form with the UM Western Financial Aid office within 30 days.