MADONNA UNIVERSITY 2019 Student Tax Information Request

Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The Office of Financial Aid will confirm the tax information reported on the FAFSA before we put on your Financial Aid awards. You will have the option to update data on the FAFSA or provide an IRS Tax Return Transcript.
Please complete one of the options below within 30 days of this request. If there are differences in between the FAFSA and the tax transcripts, the FAFSA may need to be corrected.

The instructions below apply to yourself and your spouse **if you are married**.

- **Filed married and filed separate** 2019 tax returns, both you and your spouse must submit 2019 IRS Tax Return Transcripts.
- Filed an **amended 2019 IRS tax return**, please request the IRS Tax Return Transcript using Option B below. You must also provide a signed copy of the 2019 IRS Form 1040X, Amended U. S. Individual Tax Return, which was filed with the IRS.
- If you were granted an **IRS filing extension,** or you were a victim of **Identity Theft**, please contact the Financial Aid Office.

Option A: Preferred Method: IRS Data Retrieval (IRS DRT) Instructions:

- ☐ Log in to your current FAFSA or start a new FAFSA at https://studentaid.gov/h/apply-for-aid/fafsa .
- ☐ In the finances section of the FAFSA, you will see a "Link to IRS" button if you are eligible to use the DRT.
- ☐ Click the "Link to IRS" button and log in to the IRS to retrieve your tax return information.
- ☐ Check the "Transfer My Tax Information into the FAFSA" box, and click the "Transfer Now" button.
- ☐ Your federal tax return information that has been transferred into the data fields on your FAFSA. Both students and parents can use the IRS DRT. To learn more about the IRS DRT, visit https://studentaid.gov/apply-for-aid/fafsa/filling-out .

Option B: 2019 IRS Return Transcript Request Instructions

Get Transcript by MAIL (5-10 calendar days)	**Get Transcript Online** (Immediate access, but can be challenging)	**Get Transcript by Phone** (5-10 business days)
Request Online to be mailed: https://www.irs.gov/individuals/get-transcript ☐ SSN or ITIN ☐ Birthdate ☐ Mailing Address from your last tax return ☐ Select **Return Transcript, 2019** or **Paper Request Form 4506-T:** ☐ Download the form at https://www.irs.gov/pub/irs-pdf/f4506t.pdf ☐ Complete items 1a - 4 ☐ Check Line 6(a) Return Transcript ☐ Sign and date the form • See example on the next page	**Request online to download:** https://www.irs.gov/individuals/gettranscript First time users will need to register and provide the following Required information: ☐ Full ☐ Email ☐ Birthdate ☐ SSN or ITIN ☐ Tax Filing Status ☐ Current Address ☐ Mobile Account/Phone **and** one of the following: ☐ Credit Card, or ☐ Mortgage or Home Equity Line of Credit, or Home Equity Line of Credit, or ☐ Auto Loan	**Dial:** 1-800-908-9946 You will need: ☐ SSN ☐ Street Address (number only) ☐ Select "Option 2" to request an IRS Tax Return Transcript for 2019. The tax transcript will be mailed to the address reported on the tax return.

Submit to the Madonna University Office of Financial Aid, 36600 Schoolcraft Rd., Livonia, MI 48150
Fax: 734.432.5405 – Telephone: 734.432.5663

2019 Student Tax Information Request

Form **4506-T** (June 2019) Department of the Treasury Internal Revenue Service

Request for Transcript of Tax Return

▶ Do not sign this form unless all applicable lines have been completed.
▶ Request may be rejected if the form is incomplete or illegible.
▶ For more information about Form 4506-T, visit *www.irs.gov/form4506t*.

OMB No. 1545-1872

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return.** There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.

1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)

2a If a joint return, enter spouse's name shown on tax return.

2b Second social security number or individual taxpayer identification number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5 Customer file number (if applicable) (see instructions)

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ ____________

a **Return Transcript,** which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . ☐

b **Account Transcript,** which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days . ☐

c **Record of Account,** which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days . . . . ☐

7 **Verification of Nonfiling,** which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days . . ☐

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days . ☐

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately. 12 / 31 / 2019   / /   / /   / /

Caution: Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

☐ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a

Sign Here

▶ **Signature** (see instructions)   Date

▶ **Title** (if line 1a above is a corporation, partnership, estate, or trust)

▶ **Spouse's signature**   Date

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form **4506-T** (Rev. 6-2019)

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