



**Office of Enrollment Management**  
*Financial Aid & Scholarships*

**SPOUSE 2016 FEDERAL TAX RETURN TRANSCRIPT REQUEST**

Your 2018-2019 application for federal student aid has been selected for verification of 2016 tax information. Please submit all required documentation listed below for your spouse. Failure to submit all required documents will result in a delay in the processing of your aid. **The student's name and LSU ID should be listed on all documents submitted.**

**Requirement  
#1**

**Submit a 2016 IRS Tax Return Transcript\*** (*Transcripts are typically front and back. Please remember this when making copies.*)

- ♦ May be requested online at [www.irs.gov](http://www.irs.gov) and selecting "Get My Tax Record" or by calling 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Account Transcript".
- ♦ If an amended tax return was filed, submit a **signed** copy of the 1040X "Amended U.S. Individual Income Tax Return" and a 2016 IRS Tax Return Transcript.
- ♦ If an individual filed or will file a 2016 income tax return with Puerto Rico, another U.S. territory, or with a foreign country, must provide:
  - A signed copy of the 2016 income tax return(s); **or**
  - A transcript obtained from a government of a U.S. territory or commonwealth; or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2016.

**QUICK FACTS ABOUT THE IRS TAX RETURN TRANSCRIPT**

- To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Individuals can request their tax transcript as soon as the IRS processes their return. The IRS generally processes online tax returns within 2-3 weeks and those filed by paper within 8-11 weeks.
- Applicants should receive the transcript within 5 to 10 calendar days after their request. This does not change upon 'peak' times for the IRS because the system is automated.
- It's FREE! No one should be charged for obtaining an IRS Tax Return Transcript.
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**Requirement  
#2**

**Submit copies of all 2016 W-2 forms**

- ♦ Amount(s) reported in Box 1 of W-2 forms should total 'Wages, Salaries, Tips, Etc.' reported on the Tax Return Transcript. If amount(s) from forms other than a W-2 are included on this line, please submit those additional documents as well.

**Requirement  
#3**

**Submit a copy of Schedule K-1 Form 1065, if applicable**

- ♦ This form is only required for tax filers who have Partnership Income reported on Schedule E of the 1040 filed

**Please see page two for a sample copy of an IRS Tax Return Transcript.**



This Product Contains Sensitive Taxpayer Data

## Tax Return Transcript

Request Date: 03-04-2009  
Response Date: 03-04-2009  
Tracking Number: 100000070432

SSN Provided: 000-00-0100  
Tax Period Ending: Dec. 31, 2008

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: 000-00-0100 SPOUSE SSN: 000-00-0200  
NAME(S) SHOWN ON RETURN: JOHN DOE & JANE DEE  
ADDRESS: 300 ANYSTREET BLVD  
DALLAS, TX 77000-0000-000

FILING STATUS: Married Filing Joint  
FORM NUMBER: 1040  
CYCLE POSTED: 20091408  
RECEIVED DATE: Feb. 15, 2009  
REMITTANCE: 0.00  
EXEMPTION NUMBER: 5  
DEPENDENT 1 NAME CTRL: ABGR  
DEPENDENT 1 SSN: 000-00-0300  
DEPENDENT 2 NAME CTRL: ABGS  
DEPENDENT 2 SSN: 000-00-0400  
DEPENDENT 3 NAME CTRL: ABGS  
DEPENDENT 3 SSN: 000-00-0500  
DEPENDENT 4 NAME CTRL:  
DEPENDENT 4 SSN:  
PREPARER SSN:  
PREPARER EIN:

### Income

WAGES, SALARIES, TIPS, ETC:	\$ 67,000.00
TAXABLE INTEREST INCOME: SCH B:	\$ 0.00
TAX-EXEMPT INTEREST:	\$ 0.00
ORDINARY DIVIDEND INCOME: SCH B:	\$ 0.00
QUALIFIED DIVIDENDS:	\$ 0.00
REFUNDS OF STATE/LOCAL TAXES:	\$ 0.00
ALIMONY RECEIVED:	\$ 0.00
BUSINESS INCOME OR LOSS (Schedule C):	\$ 0.00
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:	\$ 0.00
CAPITAL GAIN OR LOSS: (Schedule D):	\$ 0.00
CAPITAL GAINS OR LOSS: SCH D PER COMPUTER:	\$ 0.00
OTHER GAINS OR LOSSES (Form 4797):	\$ 0.00
TOTAL IRA DISTRIBUTIONS:	\$ 0.00
TAXABLE IRA DISTRIBUTIONS:	\$ 0.00
TOTAL RETIREMENT AND ANNUITIES:	\$ 0.00