

## Submitting Copies of Student 2011 Federal Income Tax Forms

When you apply for financial aid for the 2012-2013 academic year, the Financial Aid Office **may** require that you submit **signed copies** of your and your spouse's 2011 federal income tax returns (1040s) to this office in order to process your financial aid. These tax returns are used to verify the information submitted on your Free Application for Federal Student Aid (FASFA). Because there are many types of tax returns, we've listed below which types are acceptable for submission.

*If you, and/or your spouse are not or were not required to submit federal income tax returns to the IRS based on income requirements, see the reverse side to complete a Non-Filing Statement in lieu of submitting copies of tax returns*

**Be sure that all copies are signed, dated, and have the student's UMID Number written on them.**

**Student's and Spouse's Tax Returns:** If you are married, you must submit copies of your spouse's federal income tax return, if he/she filed separately.

- **Federal Tax Returns:** All signed and dated copies of 2011 paper tax returns and attached schedules are acceptable (1040, 1040EZ, 1040A). You must also include all copies of W-2 forms.
- **Electronic File Receipts:** (for those who file their taxes electronically): Some signed and dated 2011 Electronic File Receipts are acceptable to submit to the Financial Aid Office; but not all Electronic File Receipts contain the information we need to verify your application, and delays may occur. An acceptable alternative is to submit a copy of a 2011 completed, signed, and dated 1040, 1040EZ, or 1040A return in lieu of your Electronic File Receipt. Note: We **cannot** accept IRS Form 8453 ("U.S. Individual Income Tax Declaration for an IRS e-file Return").
- **Tax Filing Extensions:** A copy of a filing extension **can** be submitted in lieu of an actual tax return; however, we **cannot** determine your eligibility for financial aid until you provide our office with a copy of your actual, filed tax return. Please see our website [www.med.umich.edu/medschool/financialaid/index.html](http://www.med.umich.edu/medschool/financialaid/index.html) to view our deadline policy in regards to tax filing extensions. Submit your extension **AND** attach an explanation of the extenuating circumstances as to why you are filing your taxes late.
- **Foreign Tax Returns:** If you or your spouse filed a foreign tax return or a tax return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or the Republic of Palau, you must submit a copy of the signed and dated 2011 tax return to the Financial Aid Office. Currency must be converted to U.S. dollars (see [www.federalreserve.gov/releases/h10/update](http://www.federalreserve.gov/releases/h10/update) to review daily exchange rates or use a currency converter such as the one at [www.oanda.com/converter/classic](http://www.oanda.com/converter/classic)). If the fiscal year does not end in December 2011, we need a **signed and dated copy** of your most recent tax return filed along with a letter from your employer or accountant stating your January 2011 through December 2011 earnings.
- **Non-Filing Statement:** If you or your spouse are not required to file a tax return (based on income requirements established by the IRS), complete and sign a 2011 Non-Filing Statement on the back of this form and submit it to the Financial Aid Office.
- **State Tax Returns:** **DO NOT** submit copies of these returns; only submit copies of federal tax returns.

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Financial Aid Office  
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## NON-FILING STATEMENT (for Tax Year 2011)

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Student's Name: Last                      First                      UMID Number (8 digits)                      E-mail Address

**You and/or Your Spouse:** *This section is to be completed by you and/or your spouse if you and/or your spouse are not or were not required to file 2011 federal income tax returns with the IRS:*

**List all sources and amounts of income earned from employment in 2011 and attach copies of available W-2 forms.**

**SOURCE OF INCOME:**

**AMOUNT OF INCOME:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I am/we are not required to file 2011 federal income tax return(s).**

\_\_\_\_\_  
*Student's Signature*                      *Date*

\_\_\_\_\_  
*Spouse's Signature*                      *Date*

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