



Office of Financial Aid
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Income Verification Guidelines

Your Free Application for Federal Student Aid (FAFSA) has been selected for a process called verification. This process requires the Financial Aid Office to verify income information reported on the FAFSA. "You" on this form refers to the individual(s) whose tax information is being requested by the College. 2025-2026 Income Verification is based on income earned in **2023**.

2023 FEDERAL INCOME TAX FILERS

If you have filed a **2023** Federal Tax Return most individuals can verify their income by providing one of the following documents:

- **Tax Return Transcript** A 2023 Tax Return transcript can be ordered from the IRS using one of the methods listed below:
 - **Online:** Go to irs.gov. Click "Get Your Tax Record". Click "Get a Transcript Online" OR "Get Transcript by Mail". When you get to the "Get Transcript" screen, be sure to select "Return Transcript" for **2023**. Once received, be sure to submit **all** pages to our office.
 - **Mail:** Complete Form 4506-T (Request for Transcript of Tax Return) and mail it to the IRS. This form is available at irs.gov under "Forms & Instructions". Be sure you send **all** pages as the mailed transcripts are double sided.
 - **Phone:** Call 1-800-908-9946. You will be put through a series of prompts to place your order. Be sure you request a "Tax Return Transcript".
- **Signed Copy of 2023 Federal Tax Return** A complete signed copy of the **2023** federal tax return that was submitted to the IRS (Signed 1040 including Schedules 1 and 3) or for foreign returns, the original tax document that was submitted to the foreign tax authority.; if an amended return has been filed, you must submit both the original and amended returns.

2023 NON-FILERS

US 2023 Non-Tax Filers must complete a Non-Tax Filer Form if they are an independent student, student's spouse, or the parent of a dependent student. This form can be obtained at www.annamaria.edu in the "Financial Aid Documents" section. If the non-filer would have filed taxes with a tax authority other than the IRS, they must also provide a Verification of Non-Filing Letter or equivalent documentation from the respective tax authority.