

Summer: Thursday, June 4, 2026

Note: Complete all sections of this worksheet in full and photographs of documents are not acceptable

Student Information			
COM ID#		Last Name	
Date of Birth		First Name	
Phone Number		Student Email	

[illegible]

Section C: Student Tax Information		
<p>Check only one box below</p> <p>I filed a 2023 Federal Tax Return</p> <p>I did not, will not, and was not required to file a 2023 Federal Tax Return</p>	<p>Submit one of the following</p> <p>I provided consent on the FAFSA. If the FA-DDX transferred over your Federal Tax information to your FAFSA, no additional documents are needed. If the transfer was not successful, you must submit a 2023 IRS Tax Return Transcript or a signed copy of your 2023 Tax Return</p> <p>Get Transcript Online- Go to www.irs.gov, click “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “Return Transcript” and NOT the “Account Transcript.” Follow the instructions to create an ID.me account if you do not already have one. You may also request it by phone at: 1-800-908-9946</p> <p>Submit a signed copy of your 2023 tax return and applicable schedules filed with the IRS</p> <div> <p>Did you earn any income from work in 2023?</p> <p>Yes* No</p> </div> <div> <p>Did you receive any W-2s and/or 1099x for income earned from work in 2023?</p> <p>Yes* No</p> </div> <p><u>*If you answered “Yes” to either question above, you are required to complete SECTION E</u></p>	

Section D: Spouse Tax Information (ONLY COMPLETE THIS SECTION IF YOU ARE MARRIED)		
Check only one box below	Submit one of the following	
	<p>My spouse provided consent on the FAFSA. If the FA-DDX transferred over their Federal Tax information to your FAFSA, no additional documents are needed. If the transfer was not successful, you must submit a 2023 IRS Tax Return Transcript or a signed copy of their 2023 Tax Return</p> <p>Get Transcript Online- Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. You may also request it by phone at: 1-800-908-9946</p> <p>Submit a signed copy of your spouse's 2023 tax return and applicable schedules filed with the IRS</p>	
My spouse filed a 2023 Federal Tax Return	Did you earn any income from work in 2023?	Yes* No
My spouse did not, will not, and was not required to file a 2023 Federal Tax Return	Did you receive any W-2s and/or 1099x for income earned from work in 2023?	Yes* No
*If you answered "Yes" to either question above, you are required to complete SECTION E		

Section E: Non Tax Filer Income Information		
ONLY COMPLETE THIS SECTION IF YOU OR YOUR SPOUSE (IF YOU ARE MARRIED) DID NOT FILE A 2023 TAX RETURN		
Student/Spouse Name	Employer/Source of Income Earned from Work in 2023	2023 Amount Earned
		\$
		\$
		\$
		\$

***If a W-2 is unavailable, attach a statement signed and dated by the student/spouse explaining why the W-2 is not available and cannot be provided in a timely manner.**

Individuals Granted a Filing Extension by the IRS

If a **filing extension** was granted by the IRS beyond the automatic six months: You must also provide the following:

- A copy of the **IRS's approval** of an extension for the tax year 2023
- A signed statement listing the sources of any 2023 income and the amount of income from each source
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for the tax year 2023
- If self-employed, a signed statement certifying the amount of Adjusted Gross Income and U.S. income tax paid for the year 2023

Individuals Who Filed an Amended IRS Income Tax Return

If an Amended IRS income tax return was filed, you must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, **and** one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return
- A 2023 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; or
- A signed copy of the 2023 IRS Form 1040 and the applicable schedule that were filed with the IRS

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide the following:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS; **and**
- A statement signed and dated by the tax filer indicating that they were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if the College of Marin questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide College of Marin with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Section F: Signature(s)

By signing this worksheet, I (we) certify that all the information reported on this form is complete and correct to the best of my knowledge. If requested, I agree to provide proof of the information that I have reported on this form. **ALL Verification documents must be submitted to Enrollment Services no later than the established deadline outlined on the first page. If not received by deadline, financial aid will be forfeited.**

Student Signature (required)

Date

Spouse Signature (optional; if married)

Date

This worksheet must be signed and dated. Digital signatures Not accepted