

Enter your JCC ID: J \_\_\_\_\_  
FA 2627 IRSSP



## IRS INCOME-TAX VERIFICATION – SPOUSE

### STUDENT'S SPOUSE TAX FILER – do not submit this form:

If student's spouse **did file, will file, or was required to file** a 2024 federal tax return, do **not** submit this form to the financial aid office. See *Tax Filer Instructions* on page 2.

### STUDENT'S SPOUSE NON-TAX FILER:

Complete/submit this form if spouse **did not file** and was **not required to file** a 2024 income tax return.

Student's name: \_\_\_\_\_ Phone: \_\_\_\_\_

Spouse's name: \_\_\_\_\_ Last 4 digits of spouse's SSN: \_\_\_\_\_

### Spouse's tax filing status:

Check here to certify spouse named above **did not file** and was **not required** to file a 2024 federal tax return.

### Spouse's Employment status: Check only one box indicating status that applies to student non-tax filer.

Check here to certify spouse was not employed, and had no income earned from work in 2024.

Check here to certify spouse **was employed** in 2024 but **was not required to file** a federal tax return, and has listed below the names of **all** employers, the amount earned from each employer in 2024, and whether an IRS W2 form or equivalent document is provided. List every employer even if the employer did not issue a W2 form. Provide copies of all 2024 W2 forms issued to you by employer(s).

Name of wage earner	Name of Employer	W2 or equivalent document provided?	Annual Amount Earned in 2024
<i>Example: Mary Doe</i>	<i>ABC Auto Body Shop</i>	<i>YES</i>	<i>\$4500.00</i>

Check this box and attach a separate page with the student's name and JCC ID number at the top if more space is needed.

**Certification:** Each person signing below certifies that all of the information reported is complete and correct.

**WARNING:** If you purposely give false or misleading information, you may be fined, sentenced to jail, or both.

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse signature: \_\_\_\_\_ Date: \_\_\_\_\_

## TAX FILER INSTRUCTIONS

If your spouse filed a 2024 federal tax return, **do not submit page 1** to the financial aid office. Instead, provide tax data by one of the following methods:

- Submit a copy of your spouse's 2024 Tax Return Transcript available from the IRS *or*,
- Submit a copy of your spouse's 2024 federal tax return with applicable schedule(s), signed by your spouse.

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## INSTRUCTIONS FOR OBTAINING TAX TRANSCRIPTS FROM THE IRS

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "**Return Transcript**" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to [www.irs.gov](http://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. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS Help Site.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form. Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

The IRS offers the following **transcript type** at no charge:

- **Wage and Income Transcript** shows data from the W2, 1099, 1098 and Form 5498, IRA Contribution Information. This transcript can be submitted in lieu of W2s and is available using Get Transcript Online or Form 4506-T.

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## INSTRUCTIONS FOR SPECIAL SITUATIONS

**Amended Returns:** Tax filers who filed a 2024 amended tax return must submit a signed copy of Form 1040-X "Amended U.S. Individual Income Tax Return **AND** a signed copy of the 2024 federal tax return with applicable schedules or a Tax Return Transcript.

**Marital Status has changed since Tax Year 2024:**

- If your marital status has changed to married since the 2024 tax filing year, you must submit a tax return transcript obtained from the IRS or a signed copy of the 2024 federal tax return with applicable schedule(s) **AND** copies of all 2024 W2s for both you and your spouse, even though you were not married in 2024. A Verification of Non-Filing Letter, W2s (if either/both worked), and page 1 of this form must be submitted for either student or spouse who did not file a 2023 federal return.
- If your marital status has changed to separated or divorced since the 2024 tax filing year and the 2024 return was filed as Married Filing Jointly, you must submit a 2024 tax return transcript or signed federal tax return with applicable schedules **AND** all W2 forms for both taxpayers on the return so income can be separated appropriately.

**Victim of IRS Tax Identity Theft:** If you are a victim of IRS tax identity theft and are unable to obtain a 2024 IRS Tax Return Transcript, you may submit the following:

- A signed copy of your tax return, including all applicable schedules filed with the IRS, **and** either:
  1. An IRS 4674C letter acknowledging the identity theft, **or**
  2. A signed and dated statement from the tax filer confirming they were a victim of IRS tax-related identity theft and that the IRS is aware of the situation.

**Non-IRS Income Tax Returns:** An individual who filed a 2024 non-IRS income tax return with a foreign tax authority must provide a signed copy of the 2024 tax return from the relevant tax authority.