

Student and Parent Income Information

Important Note: If the student or parent filed an amended 2022 IRS tax return, *the student or parent must contact Student Financial Services at financialservices@montreat.edu before completing this section.*

1. STUDENT TAX RETURN FILERS

Check the box that applies:

- The student has used the **IRS Direct Data Exchange (FA-DDX)** to transfer their 2022 IRS income information into their FAFSA. *Contact Student Financial Services for instructions to learn how to use this tool.*
- The student is unable or chooses not to use the IRS Direct Data Exchange (FA-DDX) and has attached a **2022 IRS Tax Return Transcript or manually signed copy of their 2022 1040 Form.** *Contact Student Financial Services to learn how to obtain an IRS tax return transcript.*

2. PARENT TAX RETURN FILERS

Check the box that applies:

- The parent has used the **IRS Direct Data Exchange (FA-DDX)** to transfer their 2022 IRS income information into the student's FAFSA. *Contact Student Financial Services for instructions on how to use this tool.*
- The parent is unable or chooses not to use IRS Direct Data Exchange (FA-DDX) and has attached a **2022 IRS Tax Return Transcript or manually signed copy of their 2022 1040 Form.** *Contact Student Financial Services to learn how to obtain an IRS tax return transcript.*

3. TAX RETURN NONFILERS

Check the box that applies:

- The **student** was not employed and had no income earned from work in 2022.
- The **parent** was not employed and had no income earned from work in 2022. **Further documentation required, see below***
- The student/parent was employed in 2022 but will not file and is not required to file an income tax return with the IRS. **Further documentation required, see below**** List below the names of all employers and the amount earned from each employer. **Please attach copies of all 2022 IRS W-2 forms** issued to the student/parent by all employers, if applicable.

Employer's Name	IRS W-2 or Equivalent Provided?	2022 Amount Earned

*If the single parent of a dependent student reports no taxes filed or income earned in 2022, that parent **must** provide both an **IRS Verification of Non-filing letter** as well as a separate written explanation indicating how they support themselves and their dependents (e.g., spousal or familial support, government assistance, etc.).

Parents who were employed but were not required to file an income tax return with the IRS must provide an **IRS Verification of Non-filing letter or a signed statement certifying that the individual(s) attempted to obtain confirmation of non-filing from the IRS and were unable to obtain the required documentation.

Identification

You must complete 1 of the following:

1. **The student must appear in person at Montreat College** to verify his or her identity by presenting an unexpired government-issued photo identification, such as, but not limited to, a driver's license or passport. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

or

2. **The student must provide via email or fax** a copy of an unexpired valid government-issued photo identification that is acknowledged in the attached notary statement as well as a notarized Statement of Educational Purpose.

Statement of Educational Purpose

I certify that I, _____, (print student's name) am the individual signing this Statement of Education Purpose and that the federal student financial assistance I may receive will only be used for educational purposes to pay for the cost of attending Montreat College for the 2024-2025 award year.

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On (date) _____, before me (notary's name), _____

personally appeared (printed name of signer), _____,

and proved to me because of satisfactory evidence of identification (type of unexpired government-issued photo ID provided) _____ to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal:

Notary Signature _____

My commission expires on (date) _____



Certifications and Signatures:

Each person signing below certifies that all of the information reported is complete and correct. **Digital or typed signatures will not be accepted; please sign manually in black ink.**

Student's Signature and Montreat ID Number

Date

Parent's Signature (Dependent Student)

Date