



## **SECTION 2: VERIFICATION OF 2024 INCOME INFORMATION FOR STUDENT TAX FILERS**

**Instructions:** Complete this section if the student and spouse (if married) **filed or will file** a 2024 IRS income tax return(s). Check all that apply:

**I/We consented to transfer the 2024 IRS income tax information and it was successfully transferred into the FAFSA.**

- In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

**I/We consented to transfer the 2024 IRS income tax information and it was not transferred into the FAFSA.**

- If the 2024 income tax return information for student and spouse (if applicable) was not available or could not be used, provide the MBU Financial Aid Office with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules. If the student and spouse (if applicable) filed "married filing separately", **both** the student and spouse's tax return transcripts for 2024 will need to be sent to us.

A 2023 IRS Tax Return Transcript may be obtained through:

- **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."
  - To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **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.
- **Automated Telephone Request**
  - Call 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.

**I/We filed an amended IRS Income Tax Return for 2024.**

- Provide a signed copy of the 2024 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, in addition to one of the following:
  - Updated income and tax information from the IRS on an ISIR record with all tax information from the original return; ○ A 2024 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 of the income and tax information required to be verified; OR ○ A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

