

Non-Filing Statement (for Tax Year 2016)

If you, your parents and/or your spouse **are not, or were not**, required to submit federal income tax returns to the IRS (or to a foreign country's government) based on income requirements, complete the **Non-Filing Statement** below and submit it via fax, postal mail or in person to the Office of Scholarships and Financial Aid in lieu of tax return copies.

Please be sure to submit to our office with all required signatures.

Student Name: Last, First

Loyola Campus ID Number (8 digits)

Email Address(es)

Section A – Student and/or the Student's Spouse

This section is to be completed by the student and/or the student's spouse if they are not or were not required to file a 2016 federal income tax return with the IRS (or to a foreign country's government).

List all sources and amounts of income earned from employment in 2016 and attach copies of available W-2 forms.

SOURCE OF INCOME (from work, child support, Social Security, etc.)	AMOUNT OF INCOME

I/we are not required to file 2016 federal income tax return(s).

Student's Signature

Date

Student Spouse's Signature

Date

Section B – Parent and/or Guardian

This section is to be completed by the student's parent(s) if they are not, or were not, required to file a 2016 federal income tax return with the IRS (or to a foreign country's government).

List all sources and amounts of income earned from employment in 2016, and attach copies of available W-2 forms.

SOURCE OF INCOME (from work, child support, Social Security, etc.)	AMOUNT OF INCOME

In addition, please complete and **submit to the IRS** a Form 4506-T-EZ.

1. The 4506-T-EZ can be found by clicking here - [Get Form 4506-T-EZ](#). You can also visit the IRS website at www.irs.gov to get a copy of the form.
2. The tax filer(s) will receive a response from the IRS via postal mail.
3. Attach a copy of the IRS response with this signed document.
- 4. The response must be signed by the tax filer.**

I am/we are certifying that this information is correct and that I am/we are not required to file 2016 federal income tax return(s) or a foreign tax return (see reverse).

Parent/Guardian Signature Date

Parent/Guardian Signature Date

Who is required by the IRS to file a Tax Return?

This information is from the 2016 IRS 1040 and 1040A Instruction Booklets (see www.irs.gov).

IF your filing status is . . .	AND at the end of 2016 you were* . . .	THEN file a return if your gross income** was at least . . .
Single (see the instructions for line 1)	under 65 65 or older	\$10,350 11,900
Married filing jointly*** (see the instructions for line 2)	under 65 (both spouses) 65 or older (one spouse) 65 or older (both spouses)	\$20,700 21,950 23,200
Married filing separately (see the instructions for line 3)	any age	\$4,050
Head of household (see the instructions for line 4)	under 65 65 or older	\$13,350 14,900
Qualifying widow(er) with dependent child (see the instructions for line 5)	under 65 65 or older	\$16,650 17,900

*If you were born on January 1, 1952, you are considered to be age 65 at the end of 2016. (If your spouse died in 2016 or if you are preparing a return for someone who died in 2016, see Pub. 501.)

****Gross income** means all income you received in the form of money, goods, property, and services that isn't exempt from tax, including any income from sources outside the United States or from the sale of your main home (even if you can exclude part or all of it). Do not include any social security benefits unless (a) you are married filing a separate return and you lived with your spouse at any time in 2016 or (b) one-half of your social security benefits plus your other gross income and any tax-exempt interest is more than \$25,000 (\$32,000 if married filing jointly). If (a) or (b) applies, see the instructions for lines 20a and 20b to figure the taxable part of social security benefits you must include in gross income. Gross income includes gains, but not losses, reported on Form 8949 or Schedule D. Gross income from a business means, for example, the amount on Schedule C, line 7, or Schedule F, line 9. But, in figuring gross income, do not reduce your income by any losses, including any loss on Schedule C, line 7, or Schedule F, line 9.

***If you didn't live with your spouse at the end of 2016 (or on the date your spouse died) and your gross income was at least \$4,050, you must file a return regardless of your age.

If your parent (or someone else) can claim you as a dependent, use this chart to see if you must file a return.

In this chart, **unearned income** includes taxable interest, ordinary dividends, and capital gain distributions. It also includes unemployment compensation, taxable social security benefits, pensions, annuities, and distributions of unearned income from a trust. **Earned income** includes salaries, wages, tips, professional fees, and taxable scholarship and fellowship grants. **Gross income** is the total of your unearned and earned income.

Single dependents. Were you **either** age 65 or older **or** blind?

- No.** You must file a return if **any** of the following apply.
- Your unearned income was over \$1,050.
 - Your earned income was over \$6,300.
 - Your gross income was more than the **larger** of—
 - \$1,050, or
 - Your earned income (up to \$5,950) plus \$350.
- Yes.** You must file a return if **any** of the following apply.
- Your unearned income was over \$2,600 (\$4,150 if 65 or older **and** blind).
 - Your earned income was over \$7,850 (\$9,400 if 65 or older **and** blind).
 - Your gross income was more than the **larger** of—
 - \$2,600 (\$4,150 if 65 or older **and** blind), or
 - Your earned income (up to \$5,950) plus \$1,900 (\$3,450 if 65 or older **and** blind).

Foreign Tax Returns:

If you, your parents, or your spouse filed a foreign tax return or a tax return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or the Republic of Palau, you must submit a copy of the signed 2016 tax return to our office. Currency must be converted to U.S. dollars (use a currency converter such as the one at www.oanda.com/converter/classic).

Fiscal and Calendar Year Differences:

If the fiscal year does not end in December 2016, we need a signed copy of your most recently filed tax return along with a letter from your employer or accountant stating your January 2016 through December 2016 earnings.