

Non-Filing Statement (for Tax Year 2008)

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 by fax, postal mail, or in person to the Office of Scholarships and Financial Aid in lieu of tax return copies. Do NOT submit to our office without ALL required signatures.

Student's Name: Last, First Loyola Campus ID Number (8 digits)

Email Address

Section A - The 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 2008 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 2008 and attach copies of available W-2 forms.

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

I am/we are not required to file 2008 federal income tax return(s).

Student's Signature Date; Spouse's Signature Date

Section B - Parent(s): *This section is to be completed by the student's parent(s) if they are not or were not required to file a 2008 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 2008, and attach copies of available W-2 forms.

*****GO TO THE NEXT PAGE******

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

I am/we are certifying that this information is correct and that I am/we are not required to file 2008 federal income tax return(s) or a foreign tax return (see below).

Father's Signature/ Date;

Mother's Signature / Date

2008 FEDERAL INCOME TAX FILING REQUIREMENTS

This information is from the 2008 IRS 1040 and 1040A Instruction Booklets (see www.irs.gov). Amounts listed are for people under the age of 65; if you are over 65, please refer to the IRS instruction booklets.

For most people, a tax return must be filed with the Internal Revenue Service (IRS) if their 2008 income was at least:

Single dependent student \$5,450

(your parents or someone else can claim you as a dependent)

(earned income)

Married, filing separately \$3,500

(gross income)

Single, if claiming self \$8,950

(gross income)

Head of household \$11,500

(gross income)

Married, filing joint return \$17,900

(gross income)

Qualifying widow(er) with dependent child \$14,400

(gross income)

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** 2008 tax return to our office. Currency must be converted to U.S. dollars (see www.federalreserve.gov/releases/h10/update to review daily exchange rates or use a currency converter such as the one at www.oanda.com/converter/classic).

If the fiscal year does not end in December 2008, we need a **signed copy** of your most recently filed tax return along with a letter from your employer or accountant stating your January 2008 through December 2008 earnings.

**RETURN TO: Loyola University New Orleans * Office of Scholarships and Financial Aid,
6363 St. Charles Ave., Campus Box 206, New Orleans, LA 70118**