



# TAX EXTENSION DOCUMENTATION FORM

## PERSONAL INFORMATION

AID YEAR: 24/25

LLU ID# or Social Security Number: \_\_\_\_\_

Name: Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

Program of Study: \_\_\_\_\_

Expected Graduation Date or Program Completion: (MM/DD/YYYY) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## TAX EXTENSION DOCUMENTATION REQUIREMENTS

If you or your parent(s) are unable to submit an IRS tax return transcript and an extension has been filed with the IRS, you may submit the following information in lieu of the IRS tax return transcript. Please note that a student or parent may still be required to submit an IRS tax return transcript after October 16 — the deadline for filing with an extension.

Documentation to submit in lieu of an IRS tax return transcript:

- Copy of IRS Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Return
- Copy of all W-2 forms or, if self-employed, a signed statement with the amount of expected AGI and U.S. income taxes paid.

List below all sources of income for the 2022 calendar year and the amount received.

Source of Income	\$ Amount
	\$
	\$
	\$
	\$
	\$

Total Income: \$ \_\_\_\_\_

Anticipated number of exemption(s) to be listed on the U.S. Income Tax Return: \_\_\_\_\_

## REQUIRED SIGNATURES

By signing below you certify, and acknowledge that all information reported on this form is true, and accurate to the best of your knowledge. You also acknowledge that, if your child is still attending LLU after October 16, 2024, you may need to submit the official IRS tax return transcript before receiving financial aid for subsequent quarters. I understand that this information will be used to determine the student's eligibility for financial aid and that false or misleading information may be cause for termination of aid and repayment of funds received.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Parent's Signature: \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
*(Parent's Signature required if student is a dependent)*

### RETURN FORM TO:

LLU Office of Financial Aid | 11139 Anderson St. Loma Linda, CA 92350  
Fax # (909) 558-4283

If you have any questions please email [Finaid@llu.edu](mailto:Finaid@llu.edu) or call (909) 558-4509

LOMA LINDA UNIVERSITY