



For Office Use Only:	
CommSpeed Key:	9TFEF
Checklist:	9UPS17 9UPP17 9TFX17 9TXI17

2016-2017 Tax Filing Extension Form

Read the following instructions before completing this form.

Will you file your 2015 Federal Income Tax Return within two weeks from today?

- YES - STOP!** Update your FAFSA information as soon as you file your return and do not submit this form.
 NO - Continue to the next questions.

Generally automatic extensions are approved with a filing date no later than October 15th. Check one box below.

- I have an approved automatic extension with a filing deadline of October 15, 2016.
Before October 1, 2016 - Complete and submit this form with all required documentation.
After October 1, 2016 - STOP! Update your FAFSA data as soon as your tax return is filed and do not submit this form.
- I have an additional extension with a filing deadline that is later than October 15th.
 If today is two weeks prior to the extension deadline, complete and submit this form with all required documentation including the additional extension approval.
 If today is within two weeks of the filing extension deadline - **STOP!** Update your FAFSA data as soon as your tax return is filed and do not submit this form.

Important Note: Federal Financial Aid will be processed based on income estimates. You must update your FAFSA with actual 2015 income tax information as soon as the tax return is filed, but no later than 2 weeks after the extension deadline. Failure to update the FAFSA with actual information will result in cancellation of Federal Financial Aid, including those funds that have already disbursed. The cancellation of awards may create a balance due to the University.

A. Student Information:

Last Name	First Name	MI	Stony Brook ID #
Address (include apt. #)	City	State	Zip Code
Date of Birth (mm/dd/yyyy)	Home Phone Number	Student's Cell Phone Number	

Check one: Student will live with parent off campus on campus

Financial Aid Dependency status (check one): Dependent Independent (must meet one of the following criteria)

Independent status criteria for financial aid purposes:

- Student born before January 1, 1993
- Student working on Master's or Doctorate Degree
- Student is Married
- Student is currently serving on active duty in the US Armed Forces or a Veteran of the US Armed Forces
- Student has children who receive more than 1/2 of their support from the student, or other dependents who the student provides more than 1/2 of their support and they live with the student
- Student was/is in foster care, orphan or ward of the court any time after the age of 13 years
- Student was/is in legal guardianship, emancipated minor, or unaccompanied youth who is homeless or at risk of being homeless.

B. Income Information:

Please submit the following supporting documentation with this form to avoid financial aid processing delays. If student and parent filed tax filing extension, submit documentation for both. If only student or parent filed tax filing extension provide documentation for the appropriate person(s).

	STUDENT	PARENT
Completed copy of IRS Form 4868 Tax Filing Extension	<input type="checkbox"/> Submitted <input type="checkbox"/> N/A	<input type="checkbox"/> Submitted <input type="checkbox"/> N/A
Copies of all 2015 income information such as W-2 / 1099 forms	<input type="checkbox"/> Submitted <input type="checkbox"/> N/A	<input type="checkbox"/> Submitted <input type="checkbox"/> N/A
IRS Tax Transcript for 2014	<input type="checkbox"/> Submitted <input type="checkbox"/> N/A	<input type="checkbox"/> Submitted <input type="checkbox"/> N/A
Were you self-employed during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please check Tax Return you will file for 2015	<input type="checkbox"/> IRS 1040 <input type="checkbox"/> IRS 1040A/EZ <input type="checkbox"/> N/A	<input type="checkbox"/> IRS 1040 <input type="checkbox"/> IRS 1040A/EZ <input type="checkbox"/> N/A

Did you (or your parent(s) for dependent students) pay child support during the year 2015? YES NO

If YES, please list the names of the persons who paid the child support, the names of the persons to whom the child support was paid, the names of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2015 for each child. If more space is needed, provide a separate page that includes the student's name and ID number at the top.

Name of Person Who Paid Child Support		
Name of Person to Whom Child Support was Paid		
Amount Paid in 2015	\$	\$
Names of Children for Whom Support was Paid		

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as a statement from the individual receiving the child support certifying the amount of child support received, or copies of the child support payment checks or money order receipts.

Did you (or your parents for dependent students) receive child support during the year 2015? YES NO

(Do not include foster care or adoption payments)

If the answer to the above question is "yes", please indicate the amount of child support received in 2015. \$ _____

D. Asset Information:

Complete the following information. Do not leave any blank spaces indicate \$0 or N/A if not applicable

	Student	Parent(s)
1. As of the date you signed your FAFSA, what was the total current balance in cash and of all savings and checking accounts?	\$ _____	\$ _____

2. As of the date you signed your FAFSA, what was the net worth of investments, (Do not include real estate)? Net worth means current value minus debt.	\$ _____	\$ _____
Examples of investments to be included:		
<ul style="list-style-type: none"> • Stock options • UGMA & UTMA accounts • Mutual Funds • Coverdell savings accounts • Commodities, etc. 	<ul style="list-style-type: none"> • Trust Funds • Money Market Funds • Certificate of Deposit • 529 College Savings Plans • Bonds 	<ul style="list-style-type: none"> • Refund value of 529 prepaid tuition plans • Other securities • Installments and land sale contracts (including mortgages held)

3. Real Estate Investments:			
a. Is the home that your family owns and resides in a multifamily dwelling? (e.g., a portion of your home contains a rental unit)	<input type="checkbox"/>	YES	<input type="checkbox"/> NO
If you answered YES to part 3a, please answer the following questions:			
What is the current market value of the property if sold today? \$ _____	What is the mortgage balance owed on the property? \$ _____	Number of family units in the property? _____	
b. Do you or your parent(s) own real estate other than your primary residence (may be listed on schedule E of 1040 tax form)?	<input type="checkbox"/>	YES	<input type="checkbox"/> NO
If you answered YES to part 3b, please answer the following questions:			
What is the total current market value of all properties if sold today? \$ _____	What is the total mortgage balances owed on all Properties? \$ _____		

