



Promise Program

2020 Income Verification Requirement TRIO Student Support Services Mount Mary University

In Section III of the Promise Program application, it outlines whether you need to provide us with your own individual tax return, or with your parents'/guardians' tax return. Per regulations, the information we need to verify is the taxable income for **2019**, as well as household size (exemptions/how many people were claimed on the tax return).

This information can be found on **the federal 1040 form**.

Please see the back side of this page for an example of the forms and where on the form this information can be found.

If a federal tax return is unavailable, or if you/your parents/guardians did not file taxes for the year 2019, please contact:

Vickie LeFlore, Promise Program Director
Haggerty Library, room 019
leflorev@mtmary.edu | (414) 930-3269

Sample Form –

Please submit a copy of the 2019 1040 form (pictured below), along with your completed Promise Program application.

Form **1040** Department of the Treasury—Internal Revenue Service (99) **2019** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status
 Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)
 Check only one box. If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial Last name Your social security number
 If joint return, spouse's first name and middle initial Last name Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Presidential Election Campaign
 Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. You Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).
 Foreign country name Foreign province/state/country Foreign postal code If more than four dependents, see instructions and ✓ here ▶

Standard Deduction Someone can claim: You as a dependent Your spouse as a dependent
 Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1955 Are blind Spouse: Was born before January 2, 1955 Is blind

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input type="checkbox"/> If qualifies for (see instructions): Child tax credit	Credit for other dependents

1 Wages, salaries, tips, etc. Attach Form(s) W-2 **1**
2a Tax-exempt interest **2a** **2b** Taxable interest. Attach Sch. B if required **2b**
3a Qualified dividends **3a** **3b** Ordinary dividends. Attach Sch. B if required **3b**
4a IRA distributions **4a** **4b** Taxable amount **4b**
4c Pensions and annuities **4c** **4d** Taxable amount **4d**
5a Social security benefits **5a** **5b** Taxable amount **5b**
6 Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ **6**
7a Other income from Schedule 1, line 9 **7a**
7b Add lines 1, 2b, 3b, 4b, 4d, 5b, 6, and 7a. This is your **total income** ▶ **7b**
8a Adjustments to income from Schedule 1, line 22 **8a**
8b Subtract line 8a from line 7b. This is your **adjusted gross income** ▶ **8b**
9 Standard deduction or itemized deductions (from Schedule A) **9**
10 Qualified business income deduction. Attach Form 8995 or Form 8995-A **10**
11a Add lines 9 and 10 **11a**
11b Taxable income. Subtract line 11a from line 8b. If zero or less, enter -0- **11b**

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form **1040** (2019)

Form 1040 (2019) Page **2**

12a Tax (see inst.). Check if any from Form(s): 1 8614 2 4972 3 **12a**
b Add Schedule 2, line 3, and line 12a and enter the total **12b**
13a Child tax credit or credit for other dependents **13a**
b Add Schedule 3, line 7, and line 13a and enter the total **13b**
14 Subtract line 13b from line 12b. If zero or less, enter -0- **14**
15 Other taxes, including self-employment tax, from Schedule 2, line 10 **15**
16 Add lines 14 and 15. This is your **total tax** ▶ **16**
17 Federal income tax withheld from Forms W-2 and 1099 **17**
18 Other payments and refundable credits:
a Earned income credit (EIC) **18a**
b Additional child tax credit. Attach Schedule 8812 **18b**
c American opportunity credit from Form 8863, line 8 **18c**
d Schedule 3, line 14 **18d**
e Add lines 18a through 18d. These are your **total other payments and refundable credits** ▶ **18e**
19 Add lines 17 and 18e. These are your **total payments** ▶ **19**

Refund
20 If line 19 is more than line 16, subtract line 16 from line 19. This is the amount you **overpaid** ▶ **20**
21a Amount of line 20 you want **refunded to you**. If Form 8888 is attached, check here **21a**
 Direct deposit? See instructions. ▶ **b** Routing number ▶ **c** Type: Checking Savings
 ▶ **d** Account number ▶

22 Amount of line 20 you want **applied to your 2020 estimated tax** ▶ **22**

Amount You Owe
23 Amount you owe. Subtract line 19 from line 16. For details on how to pay, see instructions ▶ **23**
24 Estimated tax penalty (see instructions) ▶ **24**

Third Party Designee
 Do you want to allow another person (other than your paid preparer) to discuss this return with the IRS? See instructions. Yes. Complete below.
 No

Designee's name ▶ Phone no. ▶ Personal identification number (PIN) ▶

Sign Here
 Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature Date Your occupation If the IRS sent you an identity Protection PIN, enter it here (see inst.) ▶
 Spouse's signature. If a joint return, **both** must sign. Date Spouse's occupation If the IRS sent your spouse an identity Protection PIN, enter it here (see inst.) ▶

Phone no. Email address

Paid Preparer Use Only
 Preparer's name Preparer's signature Date PTIN Check if:
 3rd Party Designee
 Self-employed
 Firm's name ▶ Phone no. Firm's EIN ▶
 Firm's address ▶

Go to www.irs.gov/Form1040 for instructions and the latest information. Form **1040** (2019)