Tax Extension Request Form 2026-2027

Answer each question regarding the student and if applicable, the students' supporting parent(s). Visit https://www.ohio.edu/financial-aid/forms for directions on submitting your forms using our Secure Upload Portal, or by mail or fax.

Student Name _____ **Student PID (Pxxxxxxxxx)** _____

Written Student Signature (Electronic Signature Not Accepted) _____ **Date** _____

Student's Spouse's Name (if applicable) _____ **Written Student's Spouse's Signature** _____ **Date** _____

Parent Name (Required for dependent students) _____ **Written Parent Signature** _____ **Date** _____

Student, spouses, or parents who have requested an extension beyond the automatic 6 month extension for the 2024 federal tax return must provide the following information to be considered for federal financial aid. No expired extension forms will be accepted for this process. Once the tax return extension has expired, the tax filer will be required to provide the 2024 IRS tax return transcript. Awards may be adjusted based on the final tax return information. Failure to provide the 2024 IRS tax return transcript after the extension has expired will result in a reversal of federal financial aid.

1. The following individual, whose information is required on the FAFSA has requested the tax extension for the 2024 federal tax filing year?

   ☐ Student
   ☐ Student's spouse
   ☐ Both Parents
   ☐ Parent 1 Name: _____
   ☐ Parent 2 Name: _____

2. What federal income tax return would the person requesting the extension file for 2024?

   ☐ IRS 1040
   ☐ U.S. Territory
   ☐ Foreign Tax Return

3. What would be the federal tax filing status of the individual who has filed the extension for 2024?

   ☐ Single
   ☐ Head of Household
   ☐ Widow(er)
   ☐ Married-filed joint return
   ☐ Married-filed separate return

4. Would the individual who filed an extension be required to file a Schedule 1? ☐ Yes ☐ No

5. Indicate below the tax documents that apply to the individual filing the tax extension. Submit these documents with this form.

	Student	Spouse	Parent (s)
2024 W-2 Forms	☐	☐	☐
2024 Self Employment (provide a signed statement indicating estimated AGI and income taxes paid in 2024)	☐	☐	☐

6. Attach/submit the following items associated with the individuals who have filed an extension:

   ☐ Copy of unexpired 2024 IRS approval for extension beyond the automatic 6 month
   ☐ Verification of Non-Filing Letter from IRS dated after October 1, 2025
   ☐ Copy of all documents checked in question 5

Note: Additional documentation may be requested upon review of the information submitted.

Office of Student Financial Aid and Scholarships
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Athens, OH 45701-2979

DO NOT SEND COMPLETED DOCUMENTS BY EMAIL. PLEASE USE OUR SECURE UPLOAD PORTAL OR SEND BY MAIL OR FAX.
https://www.ohio.edu/financial-aid/forms

Questions?
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