

Colgate University

Requesting a Tax Return Transcript

For Students and/or Parents Selected for Federal Verification

Please note: If listed on your portal, this federal requirement must be satisfied before your financial aid eligibility can be finalized. If you have questions about this requirement, please contact the Office of Financial Aid at finaid@colgate.edu.

If you are asked to submit a tax return transcript, please be aware:

1. Even if you've already submitted the relevant year's tax return, a tax return transcript may still be required of you.
2. In lieu of the transcript, you may submit a correction to your [FAFSA](#) (Free Application for Financial Aid) and select to use the IRS Data Retrieval Tool (DRT), *if* you are eligible to do so. Please notify us if you successfully use the DRT, so we can waive the transcript requirement.

If DRT is not an option, you may request a tax return transcript, free of charge, by following the instructions noted below:

Online Request – no wait to receive results; must register to use the service

- Visit <https://www.irs.gov/individuals/get-transcript>.
- Make note of the requirements listed under the heading "What You Need."
- Click on the "Get Transcript Online" button, and follow remaining instructions on the site.

Mail Request – 5-10-day wait to receive results; need not register to use the service

- Visit <https://www.irs.gov/individuals/get-transcript>.
- Make note of the requirements listed under the heading "What You Need."
- Click on the "Get Transcript by Mail" button, and follow remaining instructions on the site.

Either way, once you've received your tax return transcript, **please add the student's name and Colgate ID#** and forward the transcript to the Office of Financial Aid only once, please, via:

E-mail *	Fax	Mail
finaid@colgate.edu	315-228-7050	Office of Financial Aid Colgate University 13 Oak Drive Hamilton, NY 13346

* For your protection, e-mails and their attachments should include only the last 4 digits of any SSNs or other personally identifying numbers.