



Soar in 4: Governor's Challenge Rebate Application



What tax form is required for the processing of the rebate?

U S Citizens and Resident Aliens should complete and submit a Form W-9, Request for Taxpayer Identification Number and Certification. Non-Resident Aliens should complete and submit a Form W-8BEN, Certificate of Foreign Status of Beneficial Owner for United State Tax Withholding and Reporting (Individuals).

Will the rebate be subject to federal tax?

For U S Citizens and Resident Aliens, the rebate will be reported to the IRS on Form 1099-MISC, Miscellaneous Income if the total rebate is in excess of \$600. For Non-Resident Aliens, the entire rebate will be reported to the IRS on Form 1042-S, Foreign Person's U S Source Income Subject to Withholding.

Visit the
FGCU

**Soar in 4:
Governor's
Challenge**
website at

[www.fgcu.edu/
soarin4](http://www.fgcu.edu/soarin4)

for additional
information.

Florida Gulf Coast University (FGCU) Regulation PR7.010 authorizes the Governor's Challenge (known as Soar in 4) Rebate for certain students who have graduated from FGCU and have met the eligibility requirements. Complete the checklist below to assure eligibility requirements have been met. Complete the application and attach applicable documents as described in each section of the application. **Submit the application to:**

Florida Gulf Coast University
10501 FGCU Boulevard South
Christina Kreiger, Edwards Hall 214D
Fort Myers, FL 33965-6565

Soar in 4 Rebate Criteria: I acknowledge that I have completed the following requirements.

<input type="checkbox"/>	I was admitted as a degree seeking, first-time-in-college (FTIC) student in the Summer 2015 or later.
<input type="checkbox"/>	I selected a major in my first year and graduated from FGCU in four years or less.
<input type="checkbox"/>	I received academic advising offered at FGCU at least once a year, every year.
<input type="checkbox"/>	I participated in internships, co-op work experiences, or other similar opportunities with potential employers.
<input type="checkbox"/>	I utilized FGCU Career Development Services for assistance including: <ul style="list-style-type: none"> • In-person advising (resume preparation, interview techniques, etc.) • Participation in recruitment events hosted by Career Development Services or the Office of Internships & Co-operative Programs.

Supporting documentation must be included in this application to prove completion of the following requirements.

<input type="checkbox"/>	I obtained full-time employment in Florida within six months of graduation with an annualized salary of \$25,000.
<input type="checkbox"/>	I have completed the appropriate tax form. <ul style="list-style-type: none"> • U.S. Citizens - Form W-9: Request for Taxpayer Identification Number and Certification -OR- • Non-Resident Aliens – Form W-8BEN: Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting.

- You may submit your application upon completion of the above checklist of criteria for eligibility and this application, but no later than one year after graduation date.
- Upon final review by the Office of the Bursar, you will either receive your rebate or notification that you are not eligible.
- Processing will take approximately four to six weeks after application is received.
- All correspondence will be mailed to the address specified on the attached Tax Form W-9 or W-8BEN.

Section I: General Student Information

Student Name	UIN
Phone Number	Permanent E-Mail Address

Section II: Employment Confirmation

Provide evidence of full-time employment in Florida within six months following graduation, with an annualized salary of \$25,000 or higher, or enlistment in U.S. military.

From Employer: Please attach two consecutive pay stubs.

If Self-Employed: Please attach one of the following:

- Articles of Incorporation in the State of Florida
- Tax Return

If Enlisted in the U.S. Military: Please attach your fully executed DD Form 4, Enlistment/Reenlistment Document Armed Forces of the United States.

Section III: Tax Information

Rebate Taxability: Complete one of the following tax forms to comply with IRS requirements.

- U.S. Citizens and Resident Aliens (Attach completed W-9)
- Nonresident Aliens (Attach completed W-8BEN)

U.S. Citizens and Resident Aliens: The amount of the rebate, if at least \$600, will be included on an IRS Form 1099-MISC, Miscellaneous Income, a copy of which will be mailed to you.

Nonresident Aliens: The total amount of the rebate will be included on an IRS Form 1042-S, Foreign Person's U S Source Income Subject to Withholding. Unless there are specific treaty benefits, 30% withholding is required.

Section IV: To be completed by the Office of the Bursar

Initial Eligibility and Tracking Form Reviewed and Criteria Certified:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Soar in 4 Rebate Application Reviewed and Criteria Certified:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Rebate Approved:	<input type="checkbox"/> Yes <input type="checkbox"/> No

Approved by:		
	Signature	Date
Rebate Amount:		
Check Issue Date:		
Check #:		
Notes:		