

Instructions:

- Please complete the following form and return it to the Financial Aid Office as part of your financial aid application.
- Please do not leave blanks. Enter “zero” if an item does not pertain to you.
- The amounts reported on this form should correspond to amounts reported on your FAFSA in the appropriate areas.
- Do not return this form to the Federal Processor.

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**Student and Spouse:**

**Untaxed Income Worksheet**

- \$ \_\_\_\_\_ Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.
- \$ \_\_\_\_\_ IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040- total of lines 28 + 32 or 1040A – line 17.
- \$ \_\_\_\_\_ Child Support **received** for all children. Don’t include foster care or adoption payments.
- \$ \_\_\_\_\_ Tax-exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b.
- \$ \_\_\_\_\_ Untaxed portions of IRA distributions from IRS Form 1040 –lines (15a minus 15b) or 1040A – lines (11a minus 11b) Exclude rollovers. If negative, enter a zero here.
- \$ \_\_\_\_\_ Untaxed portions of pensions from IRS Form 1040 –lines (16a minus 16b) or 1040A – lines (12a minus 12b) Exclude rollovers. If negative, enter a zero here.
- \$ \_\_\_\_\_ Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).
- \$ \_\_\_\_\_ Veterans’ noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- \$ \_\_\_\_\_ Other untaxed income not reported, such as workers’ compensation, disability, etc. **Don’t include:** student aid, earned income credit, additional child tax credit, welfare benefits, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
- \$ \_\_\_\_\_ **Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.**
- \$ \_\_\_\_\_ **TOTAL Untaxed Income Worksheet**

**Additional Financial Information**

- \$ \_\_\_\_\_ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31.
- \$ \_\_\_\_\_ Child support **paid** because of divorce or separation or as a result of a legal requirement. Don’t include support for children in your household, as reported in question 96.
- \$ \_\_\_\_\_ Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships
- \$ \_\_\_\_\_ Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes Americorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
- \$ \_\_\_\_\_ Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).
- \$ \_\_\_\_\_ **TOTAL Additional Financial Information**

Student Signature \_\_\_\_\_ Date \_\_\_\_\_ Print Name \_\_\_\_\_

Spouse’s Signature \_\_\_\_\_ Date \_\_\_\_\_ Print Name \_\_\_\_\_