

2019-2020

ADDITIONAL FINANCIAL INCOME – STUDENT

STUDENT:

First Name: _____ Last Name: _____ Student ID #: _____

INSTRUCTIONS: Both tax filers and non-tax filers must report any untaxed income received in calendar year 2017. Be sure to report benefits paid directly to you and enter “0” (zero) if no funds were received or if the item is not applicable. Do not use cents; please round to the whole dollar amount. Married students: enter the combined amounts for you and your spouse.

REPORT CALENDAR YEAR 2017 ANNUAL AMOUNTS

Student’s 2017 Additional Financial Information	Student’s (Q44)
a. Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 33.	\$
b. 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 95.	\$
c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
d. Taxable 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.	\$
e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don’t include untaxed combat pay (12Q on the W-2s).	\$
f. Earnings from work under a cooperative education program offered by a college.	\$

Student’s 2017 Untaxed Income	Student’s (Q45)
a. 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 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don’t include amounts reported in code DD (employer contributions toward employee health benefits).	\$
b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	\$
c. Child support received for any of your children. Don’t include foster care or adoption payments.	\$
d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$
e. 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.	\$
f. 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.	\$
g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don’t include the value of on-base military housing or the value of a basic military allowance for housing.	\$
h. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
i. Other untaxed income not reported in items 45a through 45h, such as workers’ compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don’t include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$

By signing this form, I declare that all information on this form is true and correct and all sources of income have been reported to the best of my knowledge.

Student Signature

Date