

2010 Additional Financial Information

- \$ _____ Education credits (American Opportunity and Lifetime Learning tax credits) from IRS Form 1040-line 49 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.
- \$ _____ 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).
- \$ _____ Earnings from work under a cooperative education program offered by a college.
- \$ _____ 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 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 you **received** for all children. Do not 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). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing.
- \$ _____ Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- \$ _____ Make Work Pay Tax Credit from 1040 line 63, or 1040A line 8.
- \$ _____ Other untaxed income not reported above, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040 line 67. **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 (if you are not a tax filer), 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.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail or both. By signing this worksheet, each person certifies that all the information reported on it is complete and correct.

Student Signature (Required) Date

Spouse's Signature (Optional) Date

