



Please answer every question. If it does not apply, put "0"

INDEPENDENT

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### 2008 Untaxed Income \*Yearly Amounts\*

- \$ \_\_\_\_\_ **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 you **received in 2008** 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).
- \$ \_\_\_\_\_ Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- \$ \_\_\_\_\_ Any other untaxed income or benefits not reported elsewhere, such as workers' compensation, disability, etc.. **Do not include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social 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. **Supply Net Benefits Statement.**
- \$ \_\_\_\_\_ Money **received** or paid on your behalf (e.g. bills), not reported elsewhere on this form.

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### 2008 Additional Financial Information

- \$ \_\_\_\_\_ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31
- \$ \_\_\_\_\_ Child support you **paid** because of divorce or separation or as a result of a legal requirement in 2008. Don't include support for children in your household, as reported in question 96 (or question 75 for your parents)
- \$ \_\_\_\_\_ Taxable earnings from need based student employment such as, Federal Work-Study and need-based employment Portions of fellowships and assistantships.
- \$ \_\_\_\_\_ 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 or scholarship portions of fellowships and assistantships.
- \$ \_\_\_\_\_ Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross Income. Do not enter untaxed combat pay reported on the W-2 (box 12, Code Q).

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison or both. By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.

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Student Signature

Date

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Spouse's Signature (Optional)

Date