

Student Name \_\_\_\_\_ Student ID# \_\_\_\_\_

# Academic Year 2019-2020

## Worksheets – Income Year 2017

Additional Financial Information Calendar Year 2017 <i>(Enter the combined amounts for you and your spouse.)</i>		
Student/Spouse		Parent(s)
\$	Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 33.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Taxable student grant and scholarship aid <b>reported to the IRS in your adjusted gross income</b> . 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. <b>Don't include</b> untaxed combat pay.	\$
\$	Earnings from work under a cooperative education program offered by a college.	\$
Untaxed Income Calendar Year 2017 <i>(Enter the combined amounts for you and your spouse.)</i>		
\$	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.	\$
\$	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.	\$
\$	Child support received for any of your children. <b>Don't include</b> 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). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veteran's non education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other untaxed income not reported in items 45a through 45h, such as workers compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040-line 25. <b>Don't include</b> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed social security benefits, supplemental security income, Workforce innovation and Opportunity 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.	\$
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$
\$	<b>TOTAL UNTAXED INCOME</b>	<b>\$</b>

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_