

Financial Aid: Student's Untaxed Income & Additional Financial Information for 2020 Tax Year

The Untaxed Income and/or Additional Financial Information for you and/or your spouse (if applicable) was changed on your 2022-2023 FAFSA **OR** there is a possible conflict in your and/or your spouse's reported financial information on your 2022-2023 FAFSA. The Financial Aid Office must resolve this conflicting financial information in order to continue processing your 2022-2023 FAFSA.

You should complete all sections below and not leave any section blank.

If the information does not pertain to you and/or your spouse (if applicable), please enter a '0' in the specific box.

Student Name: _____

Student ID: _____

Student's 2020 Untaxed Income - Enter the combined amounts for you and/or your spouse.		
1.	Payments to tax-deferred pension and retirement 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).	\$ _____
2.	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1 - total of lines 15+19.	\$ _____
3.	Child support received for any of your children. Don't include foster care or adoption payments.	\$ _____
4.	Tax exempt interest income from IRS Form 1040 - line 2a.	\$ _____
5.	Untaxed portions of IRA distributions and pensions from IRS Form 1040 - (lines 4a+5a) minus (lines 4b+5b). Exclude rollovers. If negative, enter a zero here.	\$ _____
6.	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.	\$ _____
7.	Veteran's non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ _____
8.	Other untaxed income not reported above, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1 - line 12. Don't include 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.	\$ _____
9.	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.	\$ _____

Student Name: _____

Student ID: _____

Student's 2020 Additional Financial Information - Enter the combined amounts for you and your spouse (if applicable).		
1.	Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3 - line 3.	\$ _____
2.	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 that were reported on the 2022-2023 FAFSA.	\$ _____
3.	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$ _____
4.	Taxable college grant and scholarship aid reported to the IRS as income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$ _____
5.	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.	\$ _____
6.	Earnings from work under a cooperative education program offered by a college.	\$ _____
7.	What was the amount of your (and spouse's) total current balance of cash, savings, and checking accounts as of the date the 2022-2023 FAFSA was completed? Don't include student financial aid.	\$ _____
8.	What was the net worth of your (and spouse's) investments, including real estate as of the date the 2022-2023 FAFSA was completed? Don't include the home in which you live.	\$ _____
9.	What was the net worth of your (and spouse's) businesses and/or investment farms as of the date the 2022-2023 FAFSA was completed? Don't include a family farm or family business with 100 or fewer full-time employees.	\$ _____

Comments:

Certification: Read, Sign, and Date

By signing this form, you certify that all the information you provided is true and complete to the best of your knowledge and you agree to provide additional documents if asked by the Financial Aid Office.

Student's Signature

Date