

Financial Aid Services

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Student Services Wing-Room 109

<http://bingfa.binghamton.edu>

2009-10 Untaxed Income Worksheet – Dependent

Print Student's Name _____

Student's Date of Birth _____

Banner ID _____

Please fill out the worksheet on the back of this form with your information and that of your parents. If the answer is zero or none, please write this in the appropriate space. Everyone supplying information on this form must sign the certification statement below.

I/ We certify that, to the best of my/ our knowledge, all the information provided on this form is true.

Student Signature

Date

Parent Signature

Date

Worksheet on the back →

Calendar Year 2008

2008 Untaxed Income

(Report Annual Amounts)

Student (Q47)

Parent(s) (Q95)

\$ _____	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-line 28 + line 32 or 1040A- line 17.	\$ _____
\$ _____	Child support received for all children. Don't 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' 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 such as workers' compensation, disability, etc. 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, 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.	\$ _____
\$ _____	Total	Total \$ _____

2008 Additional Financial Information

(Report Annual Amounts)

Student (Q46)

Parents (Q94)

\$ _____	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 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 (or your parents') household, as reported in question 96 (or question 75 for your parents).	\$ _____
\$ _____	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 the 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 the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$ _____
\$ _____	Total	Total \$ _____