

Financial Aid Services

P.O. Box 6000, Binghamton, NY 13902-6000
(607) 777-2428 FAX: (607) 777-6897
Student Services Wing-Room 109

<http://bingfa.binghamton.edu>

2009-10 Untaxed Income Worksheet – Independent

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 spouse, if applicable). 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

Worksheet on the back →

Calendar Year 2008

2008 Untaxed Income (Report Annual Amounts)

Student/Spouse (Q47)

\$ _____ **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 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**

2008 Additional Financial Information (Report Annual Amounts)

Student/Spouse (Q46)

\$ _____ **Education** credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.

\$ _____ **Child** support you 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.

\$ _____ **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**