UNTAXED INCOME WORKSHEET

INDEPENDENT

2009-2010

Name:_____

Address:_____ Date:_____

City/State/Zip:_____ PID: _____

E-mail Address:_____ Phone #: _____

Student (and spouse if married) must complete each question on this page!
Do not count financial aid as untaxed income. Answer each question with the correct figure or zero.

We are unable to continue processing your 2009-2010 application for financial aid because it contains incomplete or conflicting information. To resolve this discrepancy, complete the following items pertaining to untaxed income and benefits you and your spouse received in 2008. If you received no untaxed income, then write 0 in the space provided.

Student/Spouse

1. Did you or your spouse **receive child support** for family members (listed in Section II) in **2008**? ____yes____no (check one).
If yes, the total amount received in **2008** was: (Do not include foster care or adoption payments.)…….. $_____

2. **Housing, food, and other living allowances** for military, clergy, or paid by others (including cash payments and cash value of benefits) received by you or your spouse in **2008** was:…… $_____

3. **Cash received or any money paid** on your or your spouse's behalf in **2008** was:…….. $_____

4. **2008** Untaxed Worker's Compensation received was:…… $_____

5. **2008** Untaxed IRA distribution or pensions/annuities. Check the **2008** tax return for:
(IRS form 1040: lines 15a minus 15b **+** 16a minus 16b = untaxed portion)
(IRS form 1040A: lines 11a minus 11b **+** 12a minus 12b = untaxed portion)
Total untaxed amount received in **2008** was:…….. $_____
WAS THE ABOVE AMOUNT REINVESTED IN A RETIREMENT ACCOUNT?
(You must circle correct answer.) ➔➔➔➔➔➔➔➔ yes/no

6. **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…… $_____

7. **2008 payments to tax-deferred pension and savings plans** (paid directly to or withheld from earnings) such as a 401k and 403b plan. **Check you and your spouse's 2008 W2 forms, normally in box 12a through 12d (Codes D, E, F, G, H, & S).** Total amount received in **2008** was:…… $_____

8. **2008 Interest income on Education IRA's** benefiting the student, (and spouse) was:…… $_____

9. **Untaxed Veterans' 2008 Benefits**:
2008 Untaxed <u>Non-Educational</u> Veterans' benefits such as Disability Pension, Death Pension, Dependency & Indemnity Compensation (DIC), etc. Total amount received in **2008** was:…… $_____

2008 Untaxed Veteran Administration Education Work-Study Allowances received in **2008** were:…… $_____

Other Untaxed Income Not Reported such as workers compensation disability. Do not include items such as those listed in the box below…… $_____

To avoid delays in processing your verification, please include other untaxed income not reported. The amount(s) that you provide will not be included as income in determining your financial aid, but rather as means of support for the household.

Name	**Total Amount** (received in calendar year 2008)
Financial Aid	
Social Security	
Welfare	
Combat Pay	

By signing this form, I certify that the information provided on this form is complete and correct to the best of my knowledge.

Student Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Office of Student Financial Assistance
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http://finaid.ucf.edu
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