

# UNTAXED INCOME WORKSHEET

## INDEPENDENT

Student's Name: _____	UCFID: _____
Address: _____	Date: _____
City: _____	State/Zip: _____
Spouse's Name: _____	Phone: _____

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

We are unable to continue processing your application for financial aid because it contains incomplete or conflicting information. To resolve this discrepancy, complete the following items pertaining to the untaxed income and benefits you and your spouse received in 2015. If you received no untaxed income, then write 0 in the space provided.

- |  | Student/Spouse |
|--|----------------|
| 1. Did you or your spouse <b>receive child support</b> for family members (listed in Section II of Verification Worksheet ) in <b>2015</b> ?<br>yes      no (check one). If yes, the total amount received in <b>2015</b> : (Do not include foster care or adoption payments).....                                       | \$ _____       |
| 2. <b>Housing, food, and other living allowances</b> paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing:.....   | \$ _____       |
| 3. Cash value for <b>expenses paid by parents, grandparents or others</b> on your or your spouse's behalf in <b>2015</b> :.....  | \$ _____       |
| 4. <b>2015</b> Untaxed IRA distribution or pensions/annuities. Check the <b>2015</b> tax return for:<br>(IRS form 1040: lines (15a minus 15b) + (16a minus 16b) = untaxed portion)<br>(IRS form 1040A: lines (11a minus 11b) + (12a minus 12b) = untaxed portion)<br>Total untaxed amount received in <b>2015</b> :..... | \$ _____       |
| <b>WAS THE ABOVE AMOUNT REINVESTED IN A RETIREMENT ACCOUNT?</b><br>(You must circle correct answer.) →   | Yes      No    |
| 5. <b>2015 payments to tax-deferred pension and savings plans</b> (paid directly to or withheld from earnings) such as a 401k and 403b plans. <b>Check your and your spouse's 2015 W-2 forms, normally in box 12a through 12d (Codes D, E, F, G, H, &amp; S)</b> . Total amount received in <b>2015</b> :.....           | \$ _____       |
| 6. <b>Untaxed Veterans' 2015 Benefits:</b>   |                |
| a. <b>2015 Untaxed Non-Educational Veterans' benefits</b> such as Disability Pension, Death Pension, Dependency & Indemnity Compensation (DIC), etc. Total amount received in <b>2015</b> :.....   | \$ _____       |
| b. <b>2015 Untaxed Veteran Administration Education Work-Study Allowances</b> received in <b>2015</b> :.....   | \$ _____       |
| 7. <b>Other 2015 Untaxed Income Not Reported</b> such as workers' compensation or disability received in 2015. Do not include items such as those listed in the box below. ....  | \$ _____       |

**ATTACH COPIES OF ALL 2015 W-2 FORMS WHEN REPORTING ITEMS ON #5.**

To avoid delays in processing your verification, please include other government benefits. 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.

Source	Total Amount (received in 2015)
Financial Aid received	
Social Security Benefits received	
Welfare received	
Other	

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

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's Signature: \_\_\_\_\_ Date: \_\_\_\_\_