

2008-2009 WORKSHEETS A, B, AND C (INCOME REQUESTED FOR CALENDAR YEAR 2007)

This worksheet is used to verify the information that was provided on the FAFSA. Read the instructions below, and complete and return this form to our office by the deadline date on your Missing Information Letter (MIL).

Printed Name

Social Security Number

- Collect your and your parents' financial documents (Federal income tax forms, W-2 forms, Social Security Form 1099, etc.). You should use these documents to complete this form.
- Read each question thoroughly.
- **Indicate an amount in ALL blanks, even if the answer is zero.**
- The amounts reported should be the total amount received in 2007; monthly amounts should be multiplied by the number of months the income was received. Example: \$1,000 per month of Social Security was received from March through December of 2007. The calculation would be:

$$\begin{array}{rcccl}
 \text{Social Security received monthly} & & \text{Number of Months Received in 2007} & & \text{Total Amount to Report} \\
 \$1,000 & \times & 10 & = & \$10,000 \\
 & & \text{March - December} & &
 \end{array}$$

- If you were required to provide your parents' income information on the FAFSA, you must also complete the parent section below.
- Our office will be comparing information from your application with copies of your and your parents' 2007 Federal tax forms, W-2 forms, or other financial documents. Federal law states that we have the right to ask you for this information before awarding Federal aid.
- If there are differences between your application information and the information on this form, we will require you to submit documentation to verify any of the amounts reported below.
- Failure to submit the appropriate documentation and/or omitting required information will delay the processing of your financial aid.

Worksheet A - Report Annual Amounts for 2007	Student/Spouse	Parent(s)
Earned income credit from IRS Form 1040 - line 66a; 1040A - line 40a; or 1040EZ - line 8a.	\$	\$
Additional child tax credit from IRS Form 1040 - line 68 or 1040A - line 41.	\$	\$
Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	\$	\$
Social Security benefits received, that were not taxed. Report total amount of benefits received for all household members that were included in "people in household" question on the FAFSA. Report benefits paid to parents in the Parents column, and benefits paid directly to student/spouse in the Student/Spouse column.	\$	\$
Worksheet A Total	\$	\$

Worksheet B - Report Annual Amounts for 2007Student/SpouseParent(s)

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 plus line 32 or 1040A - line 17.	\$	\$
Child support you 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.	\$	\$
Foreign income exclusion from IRS Form 2555 - line 45 or 2555EZ – line 18.	\$	\$
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.	\$	\$
Credit for federal tax on special fuels from IRS Form 4136 - line 17 – (nonfarmers only).	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$	\$
Veterans noneducation benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported elsewhere on Worksheet A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. <u>Tax filers only</u> : report combat pay not included in adjusted gross income on your tax return. Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements, (e.g., cafeteria plans).	\$	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$	\$XXXXXXXX

Worksheet B Total \$ \$**Worksheet C - Report Annual Amounts for 2007**Student/SpouseParent(s)

Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 - line 49 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 (or your parents') household, as reported in "people in household" question on FAFSA. <i>Attach a signed statement indicating the name(s) of the child(ren) for which the child support was paid.</i>	\$	\$
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 your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$	\$

Worksheet C Total \$ \$

By signing this worksheet you agree, if asked, to provide information that will verify the accuracy of your completed form. This information may include Federal income tax forms that you filed or are required to file, W-2 Forms, etc.

Student's Signature_____
Parent's Signature_____
Date