

**FORM TITLE:** OTHER UNTAXED INCOME

**FORM USE:** Used to verify the student and/or the student's parent (if dependent student) sources and amounts of other untaxed income for tax year 2014.

**INSTRUCTIONS:**

**Section A: Student Information (please print)**

1. Student's name: Last, first and middle initial.
2. Student's address: Street, city, state, and zip code.
3. Student's Social Security Number (last 4 –digits only).
4. Student's email address.
5. Student's home phone number and alternate/cell phone number.

**Section B: Student Income Instructions**

- 6a. (Student/Spouse) Please check each item in Table A as it applies and the total amount.
- 6b. (Parent) If parental information was required on the FAFSA, please report any untaxed income they received. Please check each item in Table A as it applies.

**Table A: Untaxed Income Items**

7. Check the item(s) that apply and enter the total amount applicable for calendar year 2014.

**Section C: Additional Information**

8. Add any other resources, benefits, and amounts received by the student and any other members of the student's household.

**Section D: Signatures**

9. The student must sign and date here. If student is a dependent, the parent (at least one) must sign and date.

**Note:** Also attach any copies of W-2s if the student/parent indicated there was income from work.

**PROCESSING INSTRUCTIONS:**

This form is to be retained in the student's financial aid file as a verification source document. All student information and household information must be answered.

**COMMENTS:**

Verification is not complete until the form has been collected, compared to the application information and conflicting data resolved through either accuracy, tolerance, calculation or reprocessing.

## 2015–2016 Verification Other Untaxed Income

Your 2015–2016 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you (and your parent(s) or spouse, if applicable) reported on your FAFSA. To verify that you provided correct information, the financial aid administrator at your school will compare your FAFSA with the information on this form and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this form, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

### A. Student's Information (please print)

\_\_\_\_\_  
Student's Last Name

\_\_\_\_\_  
Student's First Name

\_\_\_\_\_  
Student's M.I.

\_\_\_\_\_  
Student's SSN (Last 4-digits)

\_\_\_\_\_  
Student's Street Address (include apt. no.)

\_\_\_\_\_  
Student's Email Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

\_\_\_\_\_  
Student's Home Phone Number (include area code)

\_\_\_\_\_  
Student's Alternate or Cell Phone Number

### B. The instructions and certifications below apply to the student (and spouse, if married) and parent(s) (if a dependent student) for verification of Other Untaxed Income for 2014.

- 1) **Student/Spouse:** Please check each item in Table A as it applies to the student (and the student's spouse, if married) and the amount (enter the combined amounts for you and your spouse).
- 2) **Parent(s):** If the student was required to provide parental information on the FAFSA, you will also need to report any untaxed income received by your parent(s). Please check each item in Table A as it applies to the student's parent(s) and the amount.

**To determine the correct annual amount for each item:** If you paid or received the same dollar amount every month in 2014, multiply that amount by the number of months in 2014 you paid or received it. If you did not pay or receive the same amount each month in 2014, add together the amounts you paid or received each month.

If more space is needed, provide a separate page with the student's name and SSN (last 4-digits) at the top.

Student's Name: \_\_\_\_\_

SSN (Last 4-digits): \_\_\_\_\_

**Table A**

(X)	Untaxed Income Item	Description	Total Amount in 2014	
			Student/Spouse	Parent(s)
	(A) Payments to tax-deferred pension and retirement savings	List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S		
	(B) Child support received	List the actual amount of any child support received in 2014 for the children in your household. <b>Note: Do not include</b> foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.		
	(C) Housing, food, and other living allowances paid to members of the military, clergy, and others	Include cash payments and/or the cash value of benefits received. <b>Note: Do not include</b> the value of on-base military housing or the value of a basic military allowance for housing.		
	(D) Veteran's non-educational benefits	List the total amount of veteran's non-educational benefits received in 2014. Include Disability, Death Pension, dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. <b>Note: Do not include</b> federal veteran's educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill.		
	(E) Other untaxed income	List the amount of other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. <b>Do not include</b> any items reported or excluded in A – D above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.		
	(F) Money received or paid on the student's behalf	List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere in this table. Enter the total amount of cash support the student received in 2014. Include support from a parent whose information <u>was not</u> reported on the student's 2015–2016 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions <b>unless the person is the student's parent whose information is reported on the student's 2015–2016 FAFSA</b> . Amounts paid on the student's behalf also include any distributions to the student from a 529 plan <u>owned by someone other than the student or the student's parents</u> , such as grandparents, aunts, and uncles of the student.		N/A (This item only pertains to students. You should not report any amounts for your parents).

Student's Name: \_\_\_\_\_

SSN (Last 4-digits): \_\_\_\_\_

**C. Additional Information.**

So that we can fully understand the student's family's financial situation, please provide below information about any other resources, benefits, and other amounts received by the student and any members of the student's household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office, and include such things as federal veterans education benefits, military housing, SNAP, TANF, etc.

If more space is needed, provide a separate page with the student's name and SSN (last 4-digits) at the top.

Name of Recipient	Type of Financial Support	Amount of Financial Support Received in 2014

**D. Certification and Signature**

Complete the actions below.

- Attach a copy of IRS Form W-2 for each source of employment income received for tax year 2014.

**Note:** This is only required if the student/parent indicates there is income earned from work. In the case of individuals who are self-employed, you will need to submit/attach a self-certification of income earned from work.

I certify that all of the information reported on this form is complete and correct.

- The student must sign this form.
- If dependent student, at least one parent must sign.

**WARNING: If you purposely give false or misleading information on this form, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
 Student's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent's Signature

\_\_\_\_\_  
 Date