

**REQUEST CLARIFICATION OF PARENTS FINANCIAL INFORMATION**

**2009-2010**

Student Name \_\_\_\_\_ ID # \_\_\_\_\_

Please complete only the section(s) indicated in the correspondence you received:

<b>Parents Asset Information</b>	
Cash, savings, and checking (total current balance, not to include value of retirement accounts)	\$
Net worth of investments (other real estate/assets; not to include retirement accounts or your primary residence)	\$
Net worth of business and/or investment farm (value minus debt)	\$

<b>Calendar Year 2008</b>	
<b>Parents Income Information</b>	
Adjusted gross income from IRS form 1040-line 37; or 1040A-line 21; or 1040EZ-line 4	\$
U.S. income tax paid from IRS form 1040-line 56; or 1040A-line 35; or 1040EZ-line 11	\$
Father's income from work (wages, salaries, tips, etc. in 2008)	\$
Mother's income from work (wages, salaries, tips, etc. in 2008)	\$

<b>Calendar Year 2008</b>	
<b>Parents Additional Financial Information</b>	
a. Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.	\$
b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 75 of the FAFSA.	\$
c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
d. Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	\$

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Student Name \_\_\_\_\_ ID # \_\_\_\_\_

**Calendar Year 2008**

**Parents Untaxed Income Information**

a. 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.	\$
b. 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.	\$
c. Child support received for all children. Don't include foster or adoption payments.	\$
d. Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$
e. 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.	\$
f. 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.	\$
g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$
h. Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
i. Other untaxed income not reported, such as worker's compensation, disability, etc. <b>Don't include</b> student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if your parents are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_

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