

REQUEST CLARIFICATION OF STUDENT FINANCIAL INFORMATION

2009-2010

Student Name _____ ID # _____

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

Student Asset Information	
Cash, savings, and checking (total current balance, do not include student financial aid)	\$
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)	\$

Calendar Year 2008	
Student Income Information	
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	\$
Student income from work (wages, salaries, tips, etc. in 2008)	\$
Spouse's income from work (wages, salaries, tips, etc. in 2008)	\$

Calendar Year 2008	
Student Additional Financial Information	
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 96 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 scholarships 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.	\$

COMPLETE PAGE 2

Student Name _____ ID # _____

Calendar Year 2008

Student Untaxed Income Information

a. Payments to tax-deferred pensions 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 non-education 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. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
j. Money received, or paid on your behalf (e.g., bills) not reported elsewhere on this form.	\$

Student Veterans Education Benefits

Number of months veterans education benefits received	\$
Monthly veterans education benefits amount	\$

Student Signature _____ Date _____

Office of Admissions and Financial Aid 3201 Burton St SE Grand Rapids, MI 49546
 616-526-6134 800-688-0122 Fax 616-526-6883 finaid@calvin.edu