

Last Name	First Name	MI.	Social Security Number
Address (include apt. #)			Date of birth
City	State	Zip Code	Phone # (include area code)

B. Family Information

List all of the people in *your household* in the spaces below including:

- yourself and your spouse if you have one **AND** your children if you will provide more than half of their support from July 1, 2010 through June 30, 2011, even if they do not live with you **AND**
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2010 through June 30, 2011.

Also, write the name of the college for any household member, excluding your parent(s) who will be attending at least half time between July 1, 2010 and June 30, 2011, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship to Student	College Attending
Martha Jones (example)	24	Wife	City College
		Self	

C. Student's Tax Forms and Income Information (all applications)

1. Check only one box below. Tax returns include the 2009 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your tax return.
- Check here if a signed tax return will be submitted to the school by _____ (date).
- Check here if you will not file and are not required to file a 2009 U.S. Income Tax Return.

2. **Funds received for child support & other untaxed income – including FIRST \$2400 of Unemployment Compensation received.** (Complete items a. through j. for FAFSA Question 45 on page 2 of this form.)

3. If you did not file and are not required to file a 2009 Federal income tax return, list below your employer(s) and any income received in 2009 (use the W-2 form or other earnings statements if available).

Sources of Income	Amounts of 2009 Income
	\$
	\$

D. Spouse's Tax Forms and Income Information

1. Check only one box below. Tax returns include the 2009 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your and your spouse's joint tax return.
- Check here and attach spouse's signed tax return if your spouse filed a separate return
- Check here if a signed spouse's tax return will be submitted to the school by _____ (date).
- Check here if your spouse will not file and are not required to file a 2009 U.S. Income Tax Return.

2. **Funds received for child support & other untaxed income – including FIRST \$2400 of Unemployment Compensation received.** (Complete items a. through j. for FAFSA Question 45 on page 2 of this form.)

3. If your spouse did not file and is not required to file a 2009 Federal income tax return, list below your spouse's employer(s) and any income received in 2009 (use the W-2 form or other earnings statements if available).

Sources of Income	Amounts of 2009 Income
	\$
	\$

2009 Additional Financial Information - Independent Students

Student/Spouse

Report amounts from your 2009 tax form

Spouse if Filing Separately

FAFSA # 44

FAFSA # 44

\$	a. Education credits (American Opportunity Hope and Lifetime Learning tax credits) from IRS Form 1040 --- line 49 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 94. List names of children:	\$
\$	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. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	f. Earnings from work under a cooperative education program offered by a college	\$

2009 Untaxed Income

Please report yearly/annual amounts

FAFSA # 45

FAFSA # 45

\$	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 care 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). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	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 workers' compensation, disability, etc. INCLUDE: First \$2400 of Unemployment Compensation received. Don't include: student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, 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.	\$

E. Sign this Worksheet

Each person signing this form certifies that all the information reported is complete and correct. If married, spouse's signature is optional.

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

Student Date

Spouse Date

Do not mail this worksheet to the Department of Education. Submit this worksheet to your Financial Aid Administrator at your school. Do not forget to sign your tax forms.