

Student's Name: _____ Student ID: _____

Introduction

The information provided on this worksheet and the supporting documentation will be used by the Financial Aid office to resolve any conflicting information related to your untaxed income that was provided on the Free Application for Federal Student Aid (FAFSA). Please report all applicable untaxed income that was received by the student and parent during the 2022 calendar year.

2022 Untaxed and Additional Income Resources	Student's	Parents
IRA deductions and payments to self-employed SEP, SIMPLE, KEOGH, and other qualified plans What to report: Refer to your 2022 IRS Federal Income Tax Return, Schedule 1 Lines 16 + 20	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____
Tax Exempt Interest What to report: List the amount of tax-exempt interest from your 2022 IRS Federal 1040 Line 2a	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____
Untaxed portions of IRA distributions. What to report: Refer to the 2022 IRS Federal Income Tax Return 1040, Lines 4a+ 5a Exclude Rollovers, if negative, enter a Zero.	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____
Untaxed portions of IRA pensions and annuities. What to report: Refer to the 2022 IRS Federal Income Tax Return 1040, Lines 4b + 5b Exclude Rollovers, If negative, enter a Zero.	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____
Foreign Income Exempt from Federal Taxation. What to report: Refer to the 2022 IRS Federal Income Tax Return 1040, Schedule 1 Line 8d)	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____	<input type="checkbox"/> Yes <input type="checkbox"/> No Amount \$_____

Disclaimer: The Office of Financial Aid reserves the right to ask for official documentation to resolve any discrepancies in addition to this form.

Independent Students: *The student must sign and date.*

Dependent Students: *The student and one parent whose information was reported on the FAFSA must sign and date.*

 Student's Signature

 Date

 Parent's Signature

 Date

Return the completed and signed form to: