



UNTAXED INCOME INCOME EXCLUSION WORKSHEET

Office of Financial Aid • Indiana University South Bend • P.O. Box 7111 • South Bend, IN 46634-7111

Print Student Name: _____ University ID Number: _____

Provide: ___ Student/Spouse Information ___ Parent Information ___ Parent and Student Information

Student/Spouse	2008 - 2009	Parent(s)
	<input type="checkbox"/> Complete Worksheet A	
\$	Earned Income Credit from IRS Form 1040, line 66a; 1040A, line 40a; 1040EZ, line 8a	\$
\$	Additional Child Tax Credit from IRS Form 1040, line 68 or 1040A, line 41	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Do not include food stamps or subsidized housing.	\$
\$	Social Security benefits received for all household members as reported in question 90 (or 66 for your parents), that were not taxed (such as SSI). Report benefits paid to parents in the parents' column, and benefits paid directly to student (or spouse) in the student/spouse column.	\$
\$	Totals	\$
	<input type="checkbox"/> Complete Worksheet B	
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040, line 28 + line 32 or 1040A, line 17	\$
\$	Child support received for all children. Do not include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040, line 8b or 1040A, line 8b	\$
\$	Foreign income exclusion from IRS Form 2555, line 45 or 2555 EZ, line 18	\$
\$	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.	\$
\$	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	\$
\$	Credit for federal tax on special fuels from IRS Form 4136, line 17 (non - farmers only)	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	\$
\$	Veterans' non-education benefits such as Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	\$
\$	Other untaxed income not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in adjusted gross income (Q35 and Q79). Do not include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements (e.g., cafeteria plans).	\$
\$	Money received , or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$
\$	Totals	\$
	<input type="checkbox"/> Complete Worksheet C	
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040, line 49 or 1040A, line 31	\$
\$	Child support paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your (or your parents') household, as reported in question 90 (or question 66 for your parents).	\$
\$	Taxable earnings from need-based employment, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	\$
\$	Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships	\$
\$	Totals	\$

Certification: Everyone who provides information on this worksheet must sign below to certify that the information they have provided is accurate as of the date signed. Anyone purposely giving false or misleading information on this form may be fined, sentenced to jail, or both. **Only one parent/stepparent signature is required for this form.**

Student Signature _____ Date _____

Spouse Signature _____ Date _____

Mother/Step Signature _____ Date _____

Father/Step Signature _____ Date _____