

Student Name: _____

Student ID Number: _____

For the Parents' column, enter the amount for the student's parent(s). For the Student's column, enter the amount for the student (and his or her spouse). Enter "0" (zero) if the item does not apply. Enter annual amounts only.

Parents' (Q88)	2021 Additional Financial Information	Student's (Q40)
\$	a. Education credits (American Opportunity and Lifetime Learning tax credits) from IRS Form 1040-Schedule 3, Line 3.	\$
\$	b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in you/your parents' household as reported in question (69) Parents (90) Student. Annual amounts only.	\$
\$	c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	d. Grant and scholarship aid reported to the IRS in the adjusted gross income. <i>Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.</i>	\$
\$	e. Combat pay or special combat pay. <i>Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).</i>	\$
\$	f. Earnings from work under a cooperative education program offered by a college.	\$

Parents' (Q89)	2021 Untaxed Income	Student's (Q41)
\$	a. Payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with 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-Schedule 1, Line 16 + Line 20	\$
\$	c. Child support received for all children in your household. Annual amounts only. <i>Don't include foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.</i>	\$
\$	d. Tax exempt interest income from IRS Form 1040-Line 2a	\$
\$	e. Untaxed portions of IRA distributions from IRS Form 1040-Lines (4a + 5a minus 4b + 5b) <i>Exclude rollovers. If negative, enter a zero here.</i>	\$
\$	f. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and/or the cash value of benefits received). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	g. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. Do not include federal veteran's educational benefits such as: <i>Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, or VEAP Benefits.</i>	\$
\$	h. Other untaxed income not reported (items 41a through 41g or for parents' items 89a through 89g), such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1-Line 13. Do not include <i>extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) 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.</i>	\$
XXXXXXXX	j. Money received, or paid on your behalf (e.g., rent, utility bills, cash given, etc.), not reported elsewhere on this form. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan <u>owned by someone other than the student's parents</u> , such as grandparents, aunts, and uncles of the student.	\$

Parent's Signature _____

Date _____

Student's Signature _____

Date _____