

# SOUTHERN UNIVERSITY AT NEW ORLEANS

## Student/Spouse

## Parent(s)

For question 40

For question 84

### Worksheet A Report Annual Amounts

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). Don't 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. \$ \_\_\_\_\_.

\$ \_\_\_\_\_ -Enter in question 40.

Enter in question 84. -\$ \_\_\_\_\_

### Worksheet B Report Annual Amounts

For question 41

For question 85

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 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-total of lines 28 + 32 or 1040A-line 17 \$ \_\_\_\_\_.

Child support **received** for all children. Don't 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 2555EZ-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 20 (nonfarmers 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, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances \$ \_\_\_\_\_.

Other untaxed income or benefits 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 AGI (FAFSA questions 35 and 79). **Don't include** student aid, Workforce Investment Act educational benefits, 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 \$ \_\_\_\_\_.

\$ \_\_\_\_\_ -Enter in question 41.

Enter in question 85. -\$ \_\_\_\_\_

### Worksheet C Report Annual Amounts

For question 42

For question 86

Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31 \$ \_\_\_\_\_.

Child support you **paid** because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parent's) household, as reported in question 90 (or question 66 for your parents) \$ \_\_\_\_\_.

Taxable earnings from need-based employment programs, 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. \$ \_\_\_\_\_.

\$ \_\_\_\_\_ -Enter in question 42.

Enter in question 86. -\$ \_\_\_\_\_

(PRINT) Student's Name

Social Security Number

By signing this worksheet, I (we) certify that all the information reported to qualify for Federal Student Aid is complete and correct.

Student's Signature

Date

Spouse's Signature

Date

NOTE: If you are classified as a DEPENDENT student (you are required to report parental information on the FAFSA and at least one parent is required to sign this form.

Parent's Signature Date