

C. Tax Forms and Income Information

Did you or will you file a 2008 Federal income tax return? Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

Student: YES (follow step a) NO (follow step b)

Spouse (if applicable): YES (follow step a) NO (follow step b)

- a. You must attach **signed** copies of these returns, including all individual W-2 forms, schedules, and attachments. If you are married, and you filed taxes separately, attach signed copies of both returns. If you (and your spouse) have not yet filed, but are planning to file, please provide copies of your tax forms once they are completed.
- b. If you (and your spouse) did not file and were **not required** to file a 2008 Federal income tax return, list your employers and other sources of income received in 2008 and the amount of money from each employer and source of income. If you need more space, attach a separate page. Attach copies of any W-2 forms.

STUDENT Employer/Source of Income	2008 Amount
	\$
	\$
	\$
	\$

SPOUSE Employer/Source of Income	2008 Amount
	\$
	\$
	\$
	\$

D. Sign this Worksheet

By signing this worksheet, I certify that all the information reported on it is complete and correct.

Student Signature

Date

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

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- If you do not have a copy of your tax return, request a copy from your tax preparer or a tax transcript from the Internal Revenue Service by calling 1-800-829-1040. (Please allow a minimum of 10 days for delivery). Be sure to sign the tax transcript.
 - If you do not have a copy of your W-2 form, contact your employer for a copy.
 - If we receive an incomplete set of taxes, a tax return that is not signed, or a worksheet that is not filled out, we will return the incomplete document to you, which can **delay the awarding process**. Please make sure everything is complete **before** submitting your documentation.
 - Be sure to **SIGN ALL** tax forms and include ALL W-2 forms.
 - **SUBMIT ALL DOCUMENTS TO:**
FINANCIAL AID OFFICE
800 W MAIN ST
WHITEWATER, WI 53190-1790
FAX: (262)472-5655

**University of Wisconsin – Whitewater
2009-2010 Income Worksheet**

Student Name _____

ID#: _____

Please report on this worksheet **annual** amounts of untaxed income for calendar year **2008**.

Student/Spouse	2008 Untaxed Income	Parent(s)
\$	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 line 28 and/or line 32 or 1040A—line 17	\$
\$	Child support you 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	\$
\$	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.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	\$
\$	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$
\$	Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, or benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. List source of untaxed income: _____	\$
\$	Money received, or paid on your behalf, (e.g., bills) not reported elsewhere on this form	XXXXXXXX
\$	←————— Total of Untaxed Income —————→	\$

Student/Spouse	2008 Additional Financial Information	Parent(s)
\$	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 parents') household, as reported on the FAFSA. List name of each child paying support for: _____	\$
\$	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 (AGI). Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the Adjusted Gross Income (AGI). Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
\$	←————— Total of Worksheet C —————→	\$

Student Signature _____

Date _____

Parent Signature _____

Date _____