

# University of Wisconsin – Whitewater

## 2010-2011 Income Worksheet

Student Name \_\_\_\_\_

ID#: \_\_\_\_\_

Please report on this worksheet **annual** amounts of untaxed income for calendar year **2009**.

Student/Spouse	2009 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 <b>all children</b> . 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). <b>Exclude rollovers</b> . If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). <b>Exclude rollovers</b> . 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' non-education 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. <b>Don't include</b> 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. <b>List source of untaxed income:</b> _____	\$
\$	Money received, or paid on your behalf, (e.g., bills) not reported elsewhere on this form	XXXXXXXX
\$	←————— <b>Total of Untaxed Income</b> —————→	\$

Student/Spouse	2009 Additional Financial Information	Parent(s)
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 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. <b>List name of each child paying support for:</b> _____	\$
\$	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).	\$
\$	←————— <b>Total of Worksheet C</b> —————→	\$

Student Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent Signature \_\_\_\_\_

Date \_\_\_\_\_