

2013-2014 Additional Financial Information Worksheet

Student's Name: _____ **SSN or MassBay ID:** _____

<u>Student/Spouse</u>	January 1, 2012 - December 31, 2012	<u>Parent/Stepparent Dependent students only</u>
2012 Untaxed Income	*DO NOT LEAVE ANY SPACES BLANK. IF THE AMOUNT IS ZERO, PLEASE WRITE IN \$0*	2012 Untaxed Income
\$	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 forms in Boxes 12a through 12d codes D, E, F, G, H and S.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS 1040 line 28 + line 32; 1040A line 17.	\$
\$	Child support received for all children. Do not include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS 1040 line 8b; 1040A line 8b.	\$
\$	Untaxed portions of IRA distributions from IRS 1040 line 15a minus 15b; 1040A line 11a minus 11b. Exclude rollovers. Enter a zero if negative.	\$
\$	Untaxed portions of pensions from IRS 1040 line 16a minus 16b; 1040A line 12a minus 12b. Exclude rollovers. Enter a zero if negative.	\$
\$	Housing, food and other living allowances paid to members of the military, clergy and others (cash payments and cash value of benefits). Do not include on-base housing or housing allowance.	\$
\$	Veterans non-education benefits such as disability, death pension, or dependency and indemnity compensation (DIC), and/or VA Educational Work-Study allowances.	\$
\$	Other untaxed income not reported elsewhere, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040 line 67. Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act 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.	\$
\$	Money received, or paid on your behalf (e.g., bills paid), not reported elsewhere on this form.	\$
Additional Financial Information		
\$	Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS 1040 line 49; 1040A line 31.	\$
\$	Child support paid because of divorce or separation or legal requirement. Do not include support for children in your (or your parent(s)'s) household.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.	\$
\$	Taxable student grant and scholarship aid reported to the IRS in your (or your parent(s)'s) adjusted gross income . Includes AmeriCorps benefits (awards, livings allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not include untaxed combat pay.	\$
\$	Earnings from work under a cooperative education program offered by a college.	\$

Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If you are a dependent student, then one parent must sign. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

 Student's Signature

 Date

 Parent's Signature (dependent only)

 Date