

2022-2023 Other Untaxed Income Worksheet

 Student's Last Name, First Name, Middle Initial.

 Stevenson University I.D. #

 Student's Home Phone Number (include area code)

 Student's Date of Birth

Complete this worksheet to verify untaxed income that may not have been provided on the FAFSA. **If any item does not apply**, enter "N/A" for Not Applicable where a response is requested, or enter 0 in an area where an amount is requested.

If the student was required to provide parental information on the FAFSA, answer each question below as it applies to the student and students parent(s) whose information is on the FAFSA.

If the student was not required to provide parental information on the FAFSA, answer each question below as it applies to the student (and the student's spouse, if married) whose information is on the FAFSA.

2020 IRS W2 forms: Provide copies of all 2020 IRS W2 forms issued by the employers to the dependent student and the student's parents or to the independent student and spouse, if the student is married.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2020, multiply that amount by the number of months in 2020 you paid or received it. If you did not pay or receive that same amount each month in 2020, add together the amounts you paid or received each month.

If more space is needed, provide a separate page with student's name and SU ID number.

A. Payments to tax-deferred pension and retirement savings

List any 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-12d with codes D, E, F,G,H and S.

Name of Person Who Made the Payment	Annual Amount Paid in 2020
Total payments to tax-deferred pension and retirement savings.	\$

B. Child support received

List the actual amount of any child support received in 2020 for the children in your household. **Exclude** foster care payments, adoption payments, or any amount that was court ordered but not actually paid.

Adult Who Received the Support	Child for Whom Support Was Received	Annual Amount Child Support Received in 2020
Total amount of child support received		\$

C. Housing, food, and other living allowances paid to members of the military, clergy, and others.

Include cash payments and/or the cash value of benefits received such as HUD. **Exclude** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Annual Amount of Benefit Received in 2020
Total amount of benefits received		\$

D. Veterans non-education benefits

List the total amount of veterans non-education benefits received in 2020. **Include** Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. **Exclude** federal veteran’s educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, and Post-9/11 GI Bill.

Name of Recipient	Type of Veterans Non-Education Benefit Received	Annual Amount of Benefit Received in 2020
Total amount of benefits received		\$

E. Other untaxed income

List the amount of other untaxed income not reported and not excluded elsewhere on this form. **Include** untaxed income such as workers’ compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 line 25, Railroad Retirement Benefits, etc. **Exclude** any items reported or excluded in A-D above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Family (TANF) , untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type of Other Untaxed Income	Annual Amount of Other Untaxed Income Received in 2020
Total amount of other untaxed income		\$

F. Money received or paid on the student’s behalf

List any money received or paid on the student’s behalf (e.g., payment of student’s bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2020. **Include** support from a parent whose information was not reported on the student’s 2022-2023 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person’s contribution **unless the person is the student’s parent whose information is reported on the student’s 2022-23 FAFSA**. Amounts paid on the student’s behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student’s parents, such as grandparents, aunts, and uncles of the student.

Purpose: e.g., Cash, Rent, Books	Source	Amount Received in 2020
Total amount received	\$	

Additional Information

Please provide below information about any other resources, benefits and other amounts received by the student and any members of the student’s household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office, and include such things as federal veterans education benefits, military housing, SNAP, TANF, HUD, etc.

Certifications and Signatures:

Name of Recipient	Type of Financial Support	Annual Amount of Financial Support Received in 2020

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student’s Signature

Date

Parent’s Signature (required for dependent students)

Date

Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Do not mail this worksheet to the U.S. Dept. of Education. Submit this worksheet to the Stevenson Financial Aid Office.