

Report of Other Untaxed Income in 2020 - Student

Student

Information:

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Last Name

First Name

Middle Initial

Student/Banner ID Number

Instructions: If the student (and/or spouse, if student is married) received any of the following untaxed income in 2020, please indicate the source of the income and provide the amounts in the appropriate table below.

If any item does not apply, enter "N/A" or \$0. If more space is needed, include a separate page with the student's name and Student ID # at the top.

Submit this form and any other required documentation (e.g., 2020 IRS Tax Return Transcript) to the financial aid administrator at your college.

A. Payments to tax-deferred pension and retirement savings plans

List payments (direct or withheld from earnings) to tax-deferred pension & retirement savings plans (e.g., 401(k) or 403(b)), including, but not limited to, amounts reported on W-2 forms in boxes 12a through 12d (codes D, E, F, G, H, & S. Do NOT include any amounts reported as code DD.)

Name of Person Who Made the Payment (student or spouse)	Annual Amount Paid in 2020

B. Rollover of IRA and Pension funds – check one box

If the student and/or spouse moved funds from one retirement account to another qualified retirement account without paying taxes on the distribution (AKA, a "rollover), provide documentation of the rollover that occurred in 2020.

- The student and/or spouse did have a rollover of IRA/ pension funds in 2020 and will provide documentation.
- The student and/or spouse did NOT have a rollover of IRA/ pension funds in 2020.

C. Child support received for children in household

List the actual amount of any child support received in 2020 for the children in your household.

Do NOT include foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Person Who Received the Support (student or spouse)	Name of Child(ren) For Whom Support Was Received	Annual amount of Child Support Received in 2020

Please do not forget to complete, sign, and date the second page of this form.

Student's Name: _____ Student/ Banner ID: _____

D. 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.

Do NOT include the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient (student or spouse)	Type of Benefit Received	Annual Amount Received in 2020

E. Veterans non-education benefits received in 2020

Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. **Do NOT include** federal veterans' educational benefits such as: Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits

Name of Recipient (student or spouse)	Type of Veteran's Non-education Benefit	Annual Amount Received in 2020

F. Other untaxed income

List the amount of any other untaxed income not reported elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, health savings account deductions (IRS Form 8889 Line 13), Railroad Retirement Benefits, etc.

Do NOT include foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation & Opportunity Act (WIOA) educational benefits, on-base military housing, military housing allowances, 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 (student or spouse)	Source/Type of Other Untaxed Income	Annual Amount Received in 2020

G. Money received or paid on the student's behalf

List the amount of cash support the student received including direct payment of the student's bills not otherwise reported. Include support from a parent whose information was not reported on the student's FAFSA. Include distributions to the student from a 529 plan owned by someone other than the student or the student's non-custodial parent(s).

Do NOT include support & payments from the parent(s) whose information was reported on the student's 2022-2023 FAFSA.

Do NOT include money received as part of a legal child support agreement.

Source/ Person Who Provided Cash Support/ Paid Student's Bill	Annual Amount Received in 2020

Certification and Signatures

The student must sign and date below, certifying that all of the information reported on it is complete and correct.

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

Student's Signature

Date