

**2016-2017
Independent Untaxed
Income Verification Worksheet**



Student ID: _____

First Name: _____ Last Name: _____

Other Untaxed Income for 2015

Answer each question below as it applies to you, the student (and the student’s spouse, if married) whose information is on the FAFSA.

To determine the correct annual amount for each item:

- If you paid or received the same dollar amount every month in 2015, multiply that amount by the number of months in 2015 you paid or received it.
- If you did not pay or receive the same amount each month in 2015, add together the amounts you paid or received each month.
- *If any item does not apply to your situation, enter “N/A” for Not Applicable.*

1. 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 through 12d with codes D, E, F, G, H, and S.

Name of Person Who Made the Payment	Total Amount Paid in 2015
Joe Jones	\$6,000

2. 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	Type of Benefit Received	Amount of Benefit Received in 2015
Joe Jones	Housing Allowance	\$6,000

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3. Veterans non-education benefits

List the total amount of veterans non-education benefits received in 2015. 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: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill.

Name of Recipient	Type of Veterans Non-Education Benefit	Amount of Benefit Received in 2015
Joe Jones	Disability	\$6,000

4. 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.

Do not include any items reported or excluded in 1 – 3 above. In addition, do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (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	Amount of Other Untaxed Income Received in 2015
Joe Jones	Disability Income	\$6,000

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5. 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 2015. 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 contributions **unless the person is the student’s spouse whose information is reported on the student’s 2016–2017 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	Amount Received in 2015	Source
Rent	\$6,000	Grandmother

Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. **The student must sign and date this worksheet. If married, the spouse’s signature is required.**

Student’s Signature

Date

Spouse’s 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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