

2010-2011
Tax Returns and Additional Resources
Office of Financial Aid ● Valparaiso University

Federal Tax Returns, W-2 forms and additional financial information is needed to complete your financial aid file. Your financial aid will not show on your billing statement or on your student account until requested items have been received and reviewed. Here are some helpful hints to insure submitted items are correct and complete:

1. The Federal tax return can be any of the following: IRS Form 1040 and all schedules, IRS form 1040A and all schedules, IRS form 1040EZ, a tax return from Puerto Rico, or a foreign income tax return. (Please DO NOT send a copy of your state tax return.)
2. **Signature** is needed on the tax return. Be sure to sign the copy of the tax return that you submit to the Financial Aid Office.
3. If you did not keep a copy of your tax return, request a copy from your tax preparer or request a tax transcript by completing IRS Form 4506T-EZ (available on our web site) or call the IRS at 1.800.829.1040.
4. W-2 forms are needed if you have wages listed on your tax return (Line 7 of the 1040, Line 7 of the 1040A and Line 1 of the 1040EZ). Please submit a legible copy of each W-2 that was received. If you can not locate a form, please contact the employer. They can send you another copy. Or you may request a copy from the IRS (by submitting the IRS form 4506-T)
5. Married students: we also need a copy of your spouse's federal tax return and W-2 forms.
6. If your parent's taxes are requested, which parent's tax return do we need? (Custodial parent means the parent who you have lived with most during the 12 months prior to filing the FAFSA.)
 - A. Your Parents are married and filed a joint return: we need a signed copy of their joint return.
 - B. Parents are married and filed separate tax returns: we need a signed copy of both tax returns.
 - C. Your parents are divorced: we need a signed copy of your custodial parent's tax return.
 - D. Your custodial parent is remarried: we need your parent's and step-parent's taxes, even if they filed separate returns.
 - E. Your parents are not married, but live together: we need the tax return of the parent who provides more financial support.
 - F. Your parent is single (divorced or widowed and not remarried): we need their tax return.
7. Do you need to file a tax return? Please refer to www.IRS.gov for more specific filing requirement, but typically you must file if:
 - A. you are married and your combined income is more than \$6,800
 - B. single (with a dependent) and income is more than \$7,100
 - C. single (with no dependent) and income is more than \$5,700

Section A: Tax Returns and W-2 Forms

Student's Name _____

VU ID # _____

Student 2009 Taxes:

- Attached is a signed copy of my (and my spouse's) federal tax return.
- I will submit a signed copy of my federal tax return to the Financial Aid Office by _____ (date).
- Check here if you will not file and are not required to file a federal tax return.

Student 2009 W-2 Forms

- Attached are legible copies of my W-2 forms.
- I was self-employed and do not have W-2 forms.
- I did not work and do not have W-2 forms.

Student's Spouse 2009 W-2 Forms

- Attached are legible copies of my spouse's W-2 forms.
- Was self-employed and does not have W-2 forms.
- Did not work and does not have W-2 forms.

Parent 2009 Taxes:

- Attached is a signed copy of my parent's federal tax return.
- I will submit a signed copy of my parent's federal tax return to the Financial Aid Office by _____ (date).
- Check here if your parents will not file and are not required to file a federal tax return.

Father / Step-Father 2009 W-2 Forms

- Attached are legible copies of my (step)father's W-2 forms.
- Was self-employed and does not have W-2 forms.
- Did not work and does not have W-2 forms.

Mother / Step-Mother 2009 W-2 Forms

- Attached are legible copies of my (step)mother's W-2 forms.
- Was self-employed and does not have W-2 forms.
- Did not work and does not have W-2 forms.

Student (and spouse)	Section B: Additional Financial Information	Parent
	Education credits (Hope and Lifetime Learning tax credits) as reported on the 2009 IRS Form 1040-line 49 or the 2009 IRS Form 1040A-line 31	
	Child Support you <u>paid</u> during 2009 because of divorce or separation or as a result of a legal requirement. Do not include support for children living in your household.	
	How much of the income listed on your 2009 tax return was earned from employment through the Federal Work-Study program or from employment portions of fellowships and assistantships.	
	How much of the income listed on your 2009 tax return was from grant or scholarships? Be sure to include grant/scholarship portions of fellowships and assistantships and AmeriCorps benefits. (Only grant and scholarship amounts above tuition, fees and books are taxable.)	
	Combat pay or special combat pay. Only enter the amount that was taxable and included in your 2009 adjusted gross income. Do not enter untaxed combat pay as reported on the W-2 in Box 12 Code Q.	

Student (and spouse)	Section C: 2009 Untaxed Income Information	Parent
	List the amount of child support that you received for all children, during the year. <u>Do not</u> include money received for foster care or adoption payments	
	List amount of housing allowances received. Clergy: include amount of (used) cash payment or value of parsonage. Military: include amount received over the "basic" military allowance for housing. Do not include value of on-based military housing.	
	List the amount of payments you made to your tax-deferred pension and savings plans. Include money that you paid directly or that was withheld from your earnings. Many times these amounts can be found on your W-2 form in box 12a, codes D, E, F, G, H and S.	
	Using line 8b from the IRS Form 1040 or 1040A, list the amount of your tax exempt interest income.	
	Using lines 15a minus 15b from the IRS form 1040 (or lines 11a minus 11b from the IRS form 1040A) , list the amount of your untaxed IRA distributions. <input type="checkbox"/> Check here if this amount was a rollover	
	Using lines 16a minus 16b from the IRS form 1040 (or lines 12a minus 12b from the IRS form 1040A) , list the amount of your untaxed pension distributions. <input type="checkbox"/> Check here if this amount was a rollover	
	List the amount of veterans non-education benefits received. This would include benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
	Using IRS Form 1040—lines 28 + 32 or from IRS Form 1040A—line 17, list the amount of IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.	
	List amount of other <u>untaxed</u> income that you received for worker's compensation or disability income.	
	List amount of any money that you received, or was paid on your behalf (e.g., bills), not reported elsewhere on this form or on your tax return. Do not include welfare payments, untaxed Social Security benefits, Supplemental Security Income, combat pay, or flexible spending arrangements.	XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX

Student Signature _____ Date _____

Parent Signature _____ Date _____
(needed for dependent students)