Valparaiso University

2013-2014 Tax and Additional Resource Worksheet

Office of Financial Aid

Student's name _____ Valpo ID # _____

Section A: Non-Filer Statement

Non-tax Filers (Student and Spouse)

☐ Check here if you will not file and are **not required** to file a 2012 Federal Tax Return.
☐ Check here if your spouse (if married) will not file and is **not required** to file a 2012 Federal Tax Return.

Non-tax Filers (Parents)

☐ Check here if your father (step-father) will not file and is **not required** to file a 2012 Federal Tax Return.
☐ Check here if your mother (step-mother) will not file and is **not required** to file a 2012 Federal Tax Return.

If any boxes are marked above, please indicate below any income that was earned during 2012. Please submit a copy of all W-2 forms or other earnings statements.

Source of Income / Name of Employer	Mother	Father	Student	Spouse
	$	$	$	$
	$	$	$	$
Check here if you did not work and do not have W-2 forms.	☐	☐	☐	☐

Section B: Tax Return Filers

Student (and spouse if married)

☐ I have used the IRS Data Retrieval Tool on the FAFSA to transfer my 2012 income information to my FAFSA.
  ☐ I did NOT make any changes to the information.
  ☐ I DID change some of the information. Reason for change:_____
☐ I was not able to use the IRS Data Retrieval Tool on the FAFSA and will obtain my Tax Return Transcript from the IRS.
  Reason: ☐ My spouse and I filed separate tax returns.
  ☐ I/we filed an amended tax return. (Please also submit a copy of IRS Form 1040X.)
  ☐ My filing status was Head of Household.
  ☐ I filed for an extension. (Please also submit the IRS Form 4868 and the 1040 tax form with estimated income.)
  ☐ I tried the data retrieval, but was unable to complete the process.
☐ I filed a foreign tax return and have attached a copy. (Please also list the currency exchange rate if not in U.S. dollars.)

Parent(s)

☐ We used the IRS Data Retrieval Tool on the FAFSA to transfer our 2012 income information to the FAFSA.
  ☐ NO changes were made to the information.
  ☐ We DID change some of the information. Reason for change:_____
☐ We were not able to use the IRS Data Retrieval Tool on the FAFSA and will obtain the Tax Return Transcript from the IRS.
  Reason: ☐ My spouse and I filed separate tax returns.
  ☐ I am now divorced/separated, but filed a joint tax return.
    Date of separation or divorce _____
  ☐ We filed an amended tax return. (Please also submit a copy of IRS Form 1040X.)
  ☐ My filing status was Head of Household.
  ☐ We filed for an extension. (Please also submit the IRS Form 4868 and the 1040 tax form with estimated income.)
  ☐ We tried the data retrieval, but were unable to complete the process.
☐ We/I filed a foreign tax return and have attached a copy. (Please also list the currency exchange rate if not in U.S. dollars.)

Section C: W-2 Forms and Self Employment

Mark all that apply	Mother	Father	Student	Spouse
W-2 Forms are attached for:	☐	☐	☐	☐
Unable to locate a W-2 Form for:	☐	☐	☐	☐
Estimated amount earned for 2012 on missing W-2 and the name of employer				
Amount of self-employment or farm income (line 12 and/or 17 from the 1040)	$	$	$	$

Section D: Additional Financial Information

Please list annual amounts for all items listed below. If zero, write 0

Student (and spouse)	**Untaxed Income Resources for 2012**	Parent (s)
$	Child support received (Do not include money for foster care or adoption payments.)	$
$	Clergy Housing allowance/Parsonage value or "Special" Military housing allowance	$
$	Veteran's Non-Educational Benefits	$
$	Worker's Compensation / Disability Income	$
$	Welfare/TANF/SNAP/Food Stamps	$
$	Untaxed Income/Cash Support not listed above (Do not include Social Security benefits.)	$

Student (and spouse)	**Other Income Adjustments for 2012**	Parent (s)
$	Taxable Income from: Federal Work Study, Co-Op Earnings, Fellowships, Combat Pay, AmeriCorps benefits, grants/scholarships over tuition, fees, books.	$
$	Child Support you paid. (Do not include support for children living in your household.) By whom (name): _____ To whom support was paid: (name) _____ For whom support was paid: (names of children) _____ _____	$
☐ Yes ☐ No ☐ N/A	IRA distributions: If you have a difference between lines 15a minus 15b from the IRS form 1040 (or lines 11a minus 11b from the IRS form 1040A), was this amount a roll-over?	☐ Yes ☐ No ☐ N/A
☐ Yes ☐ No ☐ N/A	Pension distributions: If you have a difference between lines 16a minus 16b from the IRS form 1040 (or lines 12a minus 12b from the IRS form 1040A), was this amount a rollover?	☐ Yes ☐ No ☐ N/A

Section E: Certification and Signatures

Each person signing this worksheet certifies that all the information reported on it is complete and correct.

Student Signature _____ Date _____

Parent Signature _____ Date _____
(required for dependent students)

Please return completed forms to: The Office of Financial Aid; Valparaiso University; 1700 Chapel Drive; Valparaiso IN 46383
Or via fax to 219-464-5012 or by email to finaid@valpo.edu