Valparaiso University

2014-2015

Tax and Additional Resource Worksheet

Office of Financial Aid

Student's name _____ Valpo ID # _____

Section A: Non-Filer Statement

Non-tax Filers (Student /Spouse)

- ☐ Check here if you did not file and are **not required** to file a 2013 Federal Tax Return.
- ☐ Check here if you **DID NOT WORK**.
- ☐ Check here if your spouse (if married) did not file and is **not required** to file a 2013 Federal Tax Return.
- ☐ Check here if your spouse (if married) **DID NOT WORK.**

Non-tax Filers (Parents)

- ☐ Check here if Parent 1/Step-Parent will not file and is **not required** to file a 2013 Federal Tax Return.
- ☐ Check here if Parent 1/Step-Parent **DID NOT WORK**.
- ☐ Check here if Parent 2/Step-Parent will not file and is **not required** to file a 2013 Federal Tax Return.
- ☐ Check here if Parent 2/Step-Parent **DID NOT WORK.**

If any boxes are marked above, please indicate below any income that was earned during 2013. Please submit a copy of all W-2 forms or other earnings statements**.**

Same-sex couples must report their marital status as married if they were legally married in a state or other jurisdiction (foreign country) that permits same-sex marriage, without regard to where the couple resides.

Section B: Filer/Non-filer Information:

	Source of Income/Employer Name	W-2's attached for: Check all that apply	Unable to locate W-2, estimated income 2013	Amount of Self-Employment or Farm Income (line 12and/or 18 from 1040)
Parent 1/Step-Parent		☐	$	$
Parent 2/Step-Parent		☐	$	$
Student		☐	$	$
Spouse		☐	$	$

Section C: Tax Return Filers

Student (and spouse if married)

- ☐ I have used the IRS Data Retrieval Tool on the FAFSA to transfer my 2013 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 1040.)
    - ☐ 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 requested a Tax Return Transcript/PDF on _____(date) from the IRS.
- ☐ 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 2013 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 requested a Tax Return Transcript /PDF on _____(date) from the IRS.
- ☐ 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 D: Additional Financial Information—List annual amounts for all items. If zero, write 0.

Student (and spouse)	**Untaxed Income Resources for 2013**	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 2013**	Parent (s)
$	Taxable Income from: Federal Work Study, Co-Op Earnings, Fellowships, Combat Pay, AmeriCorps benefits, grants/scholarships over tuition, fees, books (circle those that apply.)	$
$	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:
Office of Financial Aid
Kretzmann Hall - Valparaiso University
1700 Chapel Drive
Valparaiso IN 46383
Fax: 219-464-5012 Email: finaid@valpo.edu