

Additional Financial Information Calendar Year 2008

INSTRUCTIONS: Answer all questions. If an answer is zero or not applicable, answer "0". Provide student signature on this form.

STUDENT (AND SPOUSE)

- \$ _____ Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.
- \$ _____ Child Support you paid because of divorce or separation or as a result of legal requirement *Don't include support for children in your household, as reported in Question 96.*
- \$ _____ Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.
- \$ _____ Grant and scholarship aid reported to the IRS in the adjusted gross income. *Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships*
- \$ _____ Combat pay or special combat pay. *Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).*

2008 Untaxed Income

- \$ _____ Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.
- \$ _____ IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-line 28 + line 32 or 1040A-line 17.
- \$ _____ Child support received for all children. *Don't include foster care or adoption payments*
- \$ _____ Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.
- \$ _____ Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). *Exclude rollovers. If negative, enter 0 here.*
- \$ _____ Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A lines (12a minus 12b). *Exclude rollovers. If negative, enter 0 here.*
- \$ _____ Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).
- \$ _____ Veterans noneducation benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- \$ _____ Other untaxed income not reported, such as worker's compensation, disability, etc. *Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.*
- \$ _____ Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.

RETURN COMPLETED FORM TO:

Saint Mary's College of California
Financial Aid Office
P.O. Box 4530
Moraga, CA 94575-4530

Student Signature

Date