

Student's Name _____

Student's ID # _____

2022 INDEPENDENT STUDENT UNTAXED INCOME WORKSHEET

Do not leave blanks. If an item does not apply, enter \$0.

\$ _____ Payments to tax-deferred pension and retirement 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. Do not include amounts reported in code DD (employer contributions toward employee health benefits). If amount is reported, submit copies of your/your spouse's W-2 Forms.

\$ _____ IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1 - total of lines 16 and 20.

\$ _____ Child support received for any of your children. Do not include foster care or adoption payments. If different from amount received in 2021, submit documentation, such as a copy of court order, to verify change.

\$ _____ Tax exempt interest income from IRS Form 1040—line 2a.

\$ _____ Untaxed portions of IRA distributions from IRS Form 1040—lines 4a minus 4b. Exclude rollovers. If negative, enter a zero here.

\$ _____ Untaxed portions of pension and annuities from IRS Form 1040—lines 5a minus 5b. Exclude rollovers. If negative, enter a zero here.

\$ _____ Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing. Submit appropriate documentation to verify amount.

\$ _____

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Projected 2023 INDEPENDENT STUDENT UNTAXED INCOME WORKSHEET
(IRS line numbers indicated below reference the 2022 Form 1040)

Do not leave blanks. If an item does not apply, enter \$0.

\$_____ Payments to tax-deferred pension and retirement 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. Do not include amounts reported in code DD (employer contributions toward employee health benefits). If amount is reported, submit copies of your/your spouse's W-2 Forms.

\$_____ IRA deductions and payments to self-