

**Additional Financial Information/Untaxed Income for Year 2009  
For Methodist University**

**STUDENT NAME:** \_\_\_\_\_ **MU STUDENT ID:** \_\_\_\_\_

**DO NOT LEAVE ANY ITEMS BLANK. IF HIGHLIGHTED, FILL IN HIGHLIGHTED AREAS ONLY**

Student/ Spouse	Additional Financial Information	Parent(s)
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	\$
\$	Child support <b>paid</b> because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 94 (or your parents' household as reported question 73).	\$
\$	Taxable earnings from need-based employment such as Federal Work-Study, and need-based employment portions of fellowships and assistantships	\$
\$	Student grant and scholarship aid reported to the IRS in your (or your parents') 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 your (or your parents) adjusted gross income. <b>Don't include untaxed combat pay reported on the W-2 (Box 12, Code Q)</b>	\$
\$	As of today, what is the total current balance of cash, savings & checking accounts? <b>(NOT fin. aid rec'd.)</b>	\$
\$	As of today, what is the net worth of investments, including real estate (not primary home)?	\$
\$	As of today, what is the net worth of current businesses and/or investment farms?	\$
	<b>Untaxed Income</b>	
\$	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 Form in Boxes 12a through 12d, codes D, E, F, G, H, & S	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040- line 28 + line 32 or 1040A-line 17	\$
\$	Child support <b>received</b> for all children. <b>Don't include foster care or adoption payments.</b>	\$
\$	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 a zero here.	
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). 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)	\$
\$	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$
\$	Any other untaxed income or benefits not reported such as worker's compensation, disability, etc. <b>Don't include</b> 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, or benefits from flexible spending arrangements (e.g. cafeteria plans). Foreign income exclusion or credit for federal tax on special fuels.	\$
\$	Money <b>received</b> , or paid on your behalf (e.g. bills), not reported elsewhere on this form. <b>(STUDENT ONLY)</b>	<b>XXXXXXXX</b>

**Student's Signature** \_\_\_\_\_ **Parent's Signature** \_\_\_\_\_

**Return this form to Methodist University Office of Financial Aid**