



2017 – 2018 Verification of Other Untaxed Income

Your eligibility for federal student aid will be delayed until this requirement is complete.

SECTION 1: IDENTIFICATION

Student Name: _____

Roosevelt ID #: _____

DEPENDENT STUDENTS (under age 24): Answer each question as it applies to you/the student and your parent(s)/step-parent, whose information appears on the FAFSA.

INDEPENDENT STUDENTS (age 24 or older): Answer each question as it applies to you/the student (and your spouse, if married), whose information appears on the FAFSA.

If an item does not apply, enter "N/A" for Not Applicable. *Your eligibility for federal student aid will be delayed until this requirement is complete.*

SECTION 2: STUDENT OR PARENT CERTIFICATION

A. Payments to tax-deferred pension and retirement savings - Submit copies of all 2015 IRS W-2 forms.

List any payments to tax-deferred pension and retirement savings plans reported on form W-2 in Boxes 12a to 12d marked with codes D, E, F, G, H, and S (report only amounts with these codes).

2015 Untaxed Income	Box 12a to 12d	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

B. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS from 1040/line 28 + line 32 or from IRS form 1040A/line 17.

2015 IRA deductions or Self-Employed Plans	Form 1040 or 1040A	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

C. Child support received

List the actual amount of any child support received in 2015 for the children in your household. Do not include foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child For Whom Support Was Received	Amount
		Total \$

Student Name: _____

Roosevelt ID #: _____

D. Tax Exempt Interest Income

List the actual amount from IRS form 1040/line 8b or from IRS form 1040A/line 8b

2015 Tax Exempt Interest Income	Form 1040 or 1040A	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

E. Untaxed Portions of IRA distributions

List the actual amount from IRS form 1040/line 15A minus 15b, or from IRS form 1040A/Line 11a minus 11b. Do not list "Rollover" amounts.

2015 Untaxed Portion of IRA Distributions	Form 1040 or 1040A	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

F. Untaxed Portions of Pensions.

List the actual amount from IRS form 1040/lines 16a minus 16b, or from IRS form 1040A/line 12a minus 12b. Do not list "Rollover" amounts.

G. Housing, food, and other living allowances paid to members of the military, clergy, and others in the household (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.

Household Recipient	Type of Benefit Received	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

H. Veterans non-education benefits

Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. Do not include federal veterans' educational benefits such as Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, or VEAP Benefits.

Household Recipient	Type of Veterans Non-education Benefit	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

Student Name: _____

Roosevelt ID #: _____

I. Other untaxed income

List the amount of other untaxed income not listed elsewhere on this form. Include untaxed income such as workers' compensation, disability benefits, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

Do not include any items already reported or excluded on this form. In addition, do not include extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Household Recipient	Type of Other Untaxed Income	Amount
Student		
Student's Spouse (if married)		
Parent/Step Parent		
Parent/Step Parent		
		Total \$

J. Money received or paid on the student's behalf

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the 2017–2018 FAFSA. Do not include support from a parent whose information was reported on the 2017–2018 FAFSA.

For example, if someone is paying rent, utility bills, or gives cash, gift cards, to the student, include the amount of that contribution. Do not include contributions from the parent on the 2017-2018 FAFSA. Amounts paid on the student's behalf also include any distributions to the student from a state college 529 plan from grandparents, aunts, uncles or other student family members. Do not include state college 529 plan disbursements owned by the student or by the parent on the 2017-2018 FAFSA.

Kind of contribution to student – e.g., rent – cash gift	Family member who gave contribution	Amount
		Total \$

SECTION 3: CERTIFICATION AND SIGNATURES

By signing this form, I certify the information on this form and any attachments are accurate and complete to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be reported to the federal Inspector General and/or subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

PHYSICAL SIGNATURE – DO NOT TYPE		PHYSICAL SIGNATURE – DO NOT TYPE	
Student Signature	Date	Parent Signature (DEPENDENT ONLY)	Date

Submit this form to the Office of Financial Aid in person (1M16 Wabash/Mezzanine Floor) or by email to fas@roosevelt.edu, or by fax (to 312-341-3545).