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An equal opportunity university
2023-2024 Untaxed Income - Student

Financial Aid
516 High Street, Old Main 265
Bellingham, WA 98225

Student Name _____ W _____
Student I.D. Number

This form must be completed by the student, for the calendar year 2021.
If you are a married student values below should include you and your spouse's information.

\$ _____ **Tax-Deferred Pensions**-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).

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

\$ _____ **Child Support Received**- Child support **received** for any of your children (not your parents).

- **Do not include** foster care or adoption payments.

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

\$ _____ **Untaxed IRA & Pensions**- Untaxed portions of IRA distributions and pensions from IRS Form 1040 (lines 4a + 5a) minus (lines 4b + 5b). If negative, enter \$0.

- **Do not include rollovers.**

\$ _____ **Military & Clergy Allowance**- 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.

\$ _____ **VA Non-Education Benefits**- Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

\$ _____ **Other Untaxed Income-** Other untaxed income not already reported above, such as workers' compensation, disability benefits, and untaxed foreign income not earned from work. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.

- **Do not include** extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act 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.

\$ _____ **Other Non-Reported Money-** Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

Certification

I understand that submitting this form electronically as an email attachment **using my WWU email account** constitutes my signature and my certification that the information provided herein is complete and correct.

Student Signature (not required if submitted from your **WWU email account**)

Date

FOR OFFICE USE ONLY

Operations:

[U_TAXS _____]