

INDEPENDENT UNTAXED INCOME WORKSHEET 2012-2013

UNIVERSITY OF VERMONT
 Student Financial Services
 223 Waterman Building
 Burlington, VT 05405
Fax: (802) 656-4076

Student Name _____ **Student ID # 95** _____

Enter all of the following that apply to you (the student) in the column on the left, and enter spouse information in the column on the right. ENTER 0 FOR ANY ITEMS THAT DO NOT APPLY.

STUDENT	Calendar Year 2011	SPOUSE
\$ _____	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W2 Form in Box 12a-12d, codes D, E, F, G, H, and S.	\$ _____
\$ _____	IRS deductions and payments to self-employed SEP, SIMPLE, and KEOGH and other qualified plans from IRS Form 1040, lines 28 + 32 or IRS Form 1040A, line 17.	\$ _____
\$ _____	Tax exempt interest income from IRS Form 1040 or 1040A, line 8b.	\$ _____
\$ _____	Untaxed portions of IRA distributions. On IRS Form 1040, subtract line 15b from line 15a, or on IRS Form 1040A, subtract line 11b from line 11a. If the result is a negative number, enter a zero on this form. Otherwise, enter the result. <i>Student: YES NO Was this IRA distribution a rollover? Spouse: YES NO</i>	\$ _____
\$ _____	Untaxed portions of pensions. On IRS Form 1040, subtract line 16b from line 16a, or on IRS Form 1040A, subtract line 12b from 12a. If the result is negative, enter a zero on this form. Otherwise, enter the result. <i>Student: YES NO Was this IRA distribution a rollover? Spouse: YES NO</i>	\$ _____
\$ _____	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$ _____
\$ _____	Veterans' non-education 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 elsewhere on this worksheet, such as worker's compensation, disability, etc. DO NOT INCLUDE student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, 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.	\$ _____
\$ _____	Cash received, or any money paid on your behalf, not reported elsewhere on this form.	N/A
\$ _____	TOTAL	\$ _____

Student Signature _____ Date _____

Spouse Signature _____ Date _____