



NAME:

ID #:

Student/Spouse Yearly Amount	<b><u>INDEPENDENT</u></b>	
Student/Spouse Yearly Amount	<b>Worksheet B Calendar year 2008</b>	
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on <b>the W-2 Form in Box 12a-12d, codes D, E, F, G, H and S</b>	
\$	Untaxed portions of 401(k) or 403 (b) plans, including <b>PERS, SERS, and /or STRS</b>	
\$	IRA deductions and payments to self-employed SEP, SIMPLE and Keogh and other qualified plans from <b>IRS Form 1040 – total of lines 28+32 or 1040A – line 17</b>	
\$	Child support <b>received</b> for all children. Don't include foster care or adoption payments	
\$	Tax exempt interest income from <b>IRS Form 1040 – line 8b or 1040A - line 8b</b>	
\$	Foreign income exclusion from <b>IRS Form 2555 – line 45 or 2555EZ - line 18</b>	
\$	Untaxed portions of pensions/IRA distributions from <b>IRS Form 1040 – lines (15a minus 15b) +(16a minus 16b) or 1040A – lines (11a minus 11b) + (12a minus 12b)</b> excluding rollovers	
\$	Credit for federal tax on special fuels from <b>IRS Form 4136 – line 17 – nonfarmers only</b>	
\$	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 elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc. <b>Don't include</b> student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans.	
\$	Cash <b>received</b> , or any money paid on your behalf, not reported elsewhere on this form	
\$	<b>TOTAL B</b>	
Student/spouse Yearly amount	<b>Worksheet C Calendar year 2008</b>	
\$	Education credits (Hope and Lifetime Learning tax credits) from <b>IRS Form 1040 – line 50 or 1040A – line 31</b>	
\$	Child support <b>paid</b> because of divorce or separation. <b>Provide a copy of your Child Support Enforcement Agency document.</b>	
\$	Taxable earnings from Federal Work Study or other need-based work programs.	
\$	Student grant, scholarship, and fellowship aid, including AmeriCorps awards, that was reported to the IRS in your (or your parents') adjusted gross income	
\$	<b>TOTAL C</b>	

### **E. Sign this Worksheet and return it along with tax forms and W-2(s) to:**

**Capital University, Financial Aid Office, 1 College and Main, Columbus, Ohio 43209**

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\_\_\_\_\_ Date \_\_\_\_\_

Student's Signature