

R

Student Rocket Number

Student Last Name

Student First Name



**2022-23  
INDEPENDENT STUDENT  
UNTAXED INCOME WORKSHEET**

COMPLETE WITH BLACK INK ONLY. ELECTRONIC SIGNATURES ARE NOT ACCEPTABLE ON THIS FORM.

The Office of Student Financial Aid is required to verify the information reported on the Free Application for Federal Student Aid (FAFSA). Processing of your federal aid application cannot continue due to conflicting information, therefore, you must complete and return this worksheet. If you were married on the date your FAFSA was filed, also include your spouse's information.

REPORT AMOUNTS RECEIVED FROM JANUARY 1, 2020 THROUGH DECEMBER 31, 2020.	STUDENT	SPOUSE
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on 2020 W-2 forms in boxes 12a through 12d, codes D, E, F, G, H, and S. <u>Do not include</u> amounts reported in boxes 12a through 12d, code DD.	\$	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from 2020 IRS Form 1040 – Schedule 1, line 15 + line 19.	\$	\$
Child support <u>received</u> for all children in 2020. <u>Do not include</u> foster care or adoption payments.	\$	\$
Tax exempt interest income from 2020 IRS Form 1040 – line 2a.	\$	\$
Untaxed portions of IRA distributions from 2020 IRS Form 1040 – line 4a minus line 4b. Exclude rollovers. If negative, enter 0.	\$	\$
Untaxed portions of pensions and annuities from 2020 IRS Form 1040 – line 5a minus line 5b. Exclude rollovers. If negative, enter 0.	\$	\$
Housing, food, and other living allowances paid in 2020 to members of the military, clergy, and others (including cash payments and cash value of benefits). <u>Do not include</u> the value of on-base military housing or the value of a basic military allowance for housing.	\$	\$
Veterans' non-education benefits received in 2020 such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income received in 2020 and not reported elsewhere on this form, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from 2020 IRS Form 1040 – Schedule 1, line 12. <u>Do not include</u> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment 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.	\$	\$
Money received or paid on the student's behalf in 2020 and not reported elsewhere on this form (e.g., payment of student's bills). <b>This includes cash support and tuition payments received from a parent and distributions to the student as a beneficiary of a 529 plan</b> owned by someone other than the student (such as parents, grandparents, aunts, and uncles of the student).	\$	\$

**CONTINUE TO PAGE 2 TO PROVIDE YOUR SIGNATURE.**

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**Certification Statement:** By signing this worksheet, I certify that all of the information reported above, used to determine eligibility for federal student financial aid, is complete and accurate. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student Signature

Date

**TO RETURN THIS FORM:**

Upload to: *myUT.utoledo.edu*  
"My Financial Aid"  
"Secure Financial Aid Document Upload"

Mail to: The University of Toledo  
Office of Student Financial Aid  
2801 West Bancroft Street, Mail Stop 314  
Toledo, OH 43606-3390

In person: Rocket Solution Central  
1200 Rocket Hall

Fax to: 419.530.5835

**Questions? Please contact Rocket Solution Central (RSC) at 419.530.8700.**