

C. Tax Forms and Income Information

All tax filers must submit a **signed** copy of all 2009 Federal Income Tax returns for yourself and parent(s) or step-parent. This includes the 2009 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

If you did not keep a copy, call the IRS at 1-800-829-1040. Press "2- Refund or Personal Tax Account" then Press "2 – Personal Tax Account", follow the instructions until given the option to select a "tax return transcript" then follow the instructions.

Check the box for those **people who did not and are not required to file a 2009 Federal Income Tax Return**. List below your/their employer(s) and any income received in 2009 (submit W-2 forms or other earning statements).

- Student Your father (or step-father) Your mother (or step-mother)

Name of Employer	Student Amount	Parent(s) Amount

Both tax filers and non-tax filers must list any untaxed income received in 2009. **Be sure to enter zeros if no funds were received.** (See Worksheets A and B of the Free Application for Federal Student Aid (FAFSA)). Failure to complete this section will delay the processing of your financial aid.

Student (spouse)	Calendar Year 2009	Parent(s) (step-parent)
UNTAXED INCOME WORKSHEET		
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on W-2 Form Box 12a - 12d, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans.	\$
\$	IRA deduction and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS form 1040 – line 28 + line 32 or 1040A line 17	\$
\$	Child support received for all children. Don't include foster care	\$
\$	Tax exempt interest income from IRS 1040 line 8b or 1040A line 8b	\$
\$	Untaxed portions of IRA distributions. IRS 1040 line (15a minus 15b) or 1040A line (11a minus 11b)	\$
\$	Untaxed portions of pensions. IRS 1040 line (16a minus 16b) or 1040A line (12a minus 12b)	
\$	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, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Don't include student aid, WIA educational benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$
\$	Cash or any money paid on your behalf (bills), not reported elsewhere on this form.	\$XXXXXXXX

D. Sign This Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. At least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

_____ Date _____
Student's Signature

_____ Date _____
Parent's Signature

Return to: *Financial Aid Office, Geneva College, 3200 College Ave., Beaver Falls, PA 15010*
Fax #: 724-847-6776 (For confidentiality reasons, we discourage faxing)
Phone#: 724-847-6530