



Untaxed Income Statement

Student

2016-2017

COMPLETE ALL SECTIONS: Please complete the form in ink and print legibly

Student's Last Name _____ First Name _____ Middle Initial _____ E _____ Student ID Number _____

On the FAFSA, question 45 (a through j) for student's 2015 untaxed income was either left blank or not all questions were answered. Concordia is required by federal regulations to confirm this information in order to complete your financial aid file.

Please answer ALL with a dollar amount or \$0. Enter the combined amounts for you and your spouse:

a	Payments to tax-deferred 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. Don't include amounts reported in code DD (employer contributions toward employee health benefits).	\$
b	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – line 17.	\$
c	Child support received for any of your children. Don't include foster care or adoption payments.	\$
d	Tax exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b.	\$
e	Untaxed portions of IRA distributions from IRS Form 1040 – lines (15a minus 15b) or 1040A – lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$
f	Untaxed portions of pensions from IRS Form 1040 – lines (16a minus 16b) or 1040A – lines (12a minus 12b). Exclude rollovers. If negative, enter zero here.	\$
g	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
h	Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
i	Other untaxed income not reported in items a through h, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 – line 25. Don't include extended foster care benefits, 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.	\$
j	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 whose financial information is not reported on this form and that is not part of a legal child support agreement. Also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, and uncles). You must include these distribution amounts here.	\$

By signing this form, I certify the information on this form is complete to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

Student Signature _____

Date _____

Return Form to:

Concordia University, Financial Aid Office
1530 Concordia West, Irvine, CA 92612
FAX: 949.214.3500; Email: finaid@cui.edu; Phone: 949.214.3066