

## 2024-2025 Untaxed Income Worksheet for Student (and Spouse)

Priority Deadline: Return by June 1, 2024 for maximum aid consideration.

| Student ID Number:            |      | Email: |        |
|-------------------------------|------|--------|--------|
| Student's<br>Full Legal Name: |      |        |        |
| (Please print clearly)        | Last | First  | Middle |

**Students** – The information you provide will be used to update or correct the information provided on the Free Application for Federal Student Aid (FAFSA). If there are differences, our office will submit corrections to your FAFSA electronically. Please complete the worksheet below using amounts you (and your spouse, if married) received for the calendar year from <u>January 1, 2022 through</u> <u>December 31, 2022.</u>

| Please provide the total amount for <b>2022</b> for all items below. <b>Do not leave any lines blank.</b> Answer all questions, using \$0 if you (and your spouse, if married) have no amount to list.  | Spouse<br>(ifmamed) | Student |
|---|---------------------|---------|
| Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on the W2 Form in boxes 12a through 12d, codes D, E, F, G, H, and S. Don't include amounts reported in code DD. | \$                  | \$      |
| IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of line 16 + line 20.   | \$                  | \$      |
| Tax exempt interest income from IRS Form 1040-line 2a.  | \$                  | \$      |
| Untaxed portions of IRA distributions and pensions from IRS Form 1040–lines (4a minus 4b) plus (5a minus 5b). <b>Exclude rollovers</b> . If negative, enter a zero here.  | \$                  | \$      |

If I purposely give false or misleading information on this worksheet, I may receive a fine, a prison sentence, or both. By signing this information request, I am certifying that all information is complete and correct.

| Student Signature:      |                                   | Date |  |
|-------------------------|-----------------------------------|------|--|
| (required)              | No electronic or typed signatures |      |  |
| Spouse Signature:       |                                   | Date |  |
| (required if married)   | No electronic or typed signatures |      |  |
| Parent Signature:       |                                   | Date |  |
| (required if dependent) | No electronic or typed signatures |      |  |

For the security of your personal information, the Virginia Tech Office of University Scholarships and Financial Aid does not accept completed forms sent via email. Please return completed forms to us via the document uploader, https://finaid.vt.edu/documentuploader.html

> Student Services Bldg (0222), Suite 200, 800 Washington Street SW, Blacksburg, VA 24061 www.finaid.vt.edu | finaid@vt.edu | phone: 540.231.5179