



MARQUETTE UNIVERSITY

2003-04 OTHER INCOME/EXPENSE REVIEW (DOC. 43)

Aid Applicant: _____ SS#: _____ - MU ID _____

We are currently reviewing your Aid Application and find a clarification of information is needed. Please provide the breakdown for the section marked below, sign and date the form and return to the address at the bottom of this form.

Worksheet A

- checkbox You reported \$ _____ in question 44 on the FAFSA.
checkbox Your parent reported \$ _____ in question 79 on the FAFSA.

Calendar Year 2002

- 1 Earned income credit from IRS Form 1040-line 64; 1040A-line 41; 1040EZ-line 8; or Telefile-line L
2 Additional child tax credit from IRS Form 1040-line 66 or 1040A-line 42
3 Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.
4 Social Security payments that were not taxed (such as SSI)

Table with 2 columns: Student/Spouse, Parent(s). Rows for items 1-4 and a Total row, each with dollar sign indicators.

Worksheet B

- checkbox You reported \$ _____ in question 45 on the FAFSA.
checkbox Your parent reported \$ _____ in question 80 on the FAFSA.

Calendar Year 2002

- 1 Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.
2 IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040—total of lines 24 + 31; or 1040A—line 17
3 Child support received for all children. Don't include foster care or adoption payments.
4 Tax exempt interest income from IRS Form 1040—line 8b; or 1040A—line 8b
5 Foreign income exclusion from IRS Form 2555—line 43; or 2555EZ—line 18
6 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
7 Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.
8 Credit for Federal tax on special fuels from IRS Form 4136—line 10 -nonfarmers only
9 Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)
10 Veterans' noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and /or VA Educational Work-Study allowances.
11 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, disability, etc. Don't include student aid, Workforce Investment Act educational benefits or benefits from flexible spending arrangements, e.g., cafeteria plans
12 Cash received or any money paid on your behalf(e.g. bills), not reported elsewhere on this form.

Table with 2 columns: Student/Spouse, Parent(s). Rows for items 1-12 and a Total row, each with dollar sign indicators.

Worksheet C

- checkbox You reported \$ _____ in question 46 on the FAFSA.
checkbox Your parent reported \$ _____ in question 81 on the FAFSA.

Calendar Year 2002

- 1 Education credits (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 48; Or 1040A-line 31.
2 Child Support paid because of divorce or separation. Don't include support for children in your (or your parents') household, as reported in question 85 (or question 65 for your parents)..
3 Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships
4 Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.

Table with 2 columns: Student/Spouse, Parent(s). Rows for items 1-4 and a Total row, each with dollar sign indicators.

I/we certify that this information is true and correct.

Student Signature _____ Date _____

Parent/Stepparent Signature _____ Date _____