



State Grant and Special Programs
1200 North Seventh Street, Harrisburg, PA 17102-1444

RECENT SEPARATION/DIVORCE FORM
(INDEPENDENT STUDENT)

(NOTE: Deadline for returning this form to PHEAA is April 1, 2009.)

Print Student's Name

Student's Social Security Number grid

Student's Social Security Number

OR

Student's Account Number grid

Student's Account Number

2008-09

It is the policy of this Agency to consider an application based on the student's income only when the student and spouse have been separated for at least two full months. In order for PHEAA to properly determine your 2008-09 Pennsylvania State Grant eligibility, complete the following, sign, and return this form and the requested tax documents to PHEAA, P.O. Box 8141, Harrisburg, PA 17105-8141 within 30 days, once the two month condition is met. No data will be accepted after April 1, 2009.

- 1. The date of your separation. (month/day/year)
The date of your divorce. (month/day/year)
2. Your current physical address (no P.O. Boxes) and phone number.
3. Provide a complete copy of your 2007 U.S. Income Tax Return including all supporting forms, schedules and W-2 Forms, if such has not previously been submitted.
4. Indicate the amount of your ADJUSTED GROSS INCOME (OR YOUR PORTION IF YOU FILED JOINTLY WITH A SPOUSE) as shown on your 2007 U.S. Income Tax Return (Form 1040 - line 37; Form 1040A - line 21; Form 1040EZ - line 4; or Form 1040X - line 1c). \$
5. Indicate welfare benefits, including Temporary Assistance For Needy Families (TANF) received in 2007 and the UNTAXED Social Security benefits (including Supplemental Security Income) that you received in 2007. Do not report monthly amounts. Be sure to include the amounts that you received for your children. DO NOT INCLUDE ANY BENEFITS REPORTED ON LINE 20b OF YOUR 2007 FORM 1040 OR LINE 14b OF FORM 1040A. \$
6. Enter the total amount of child support received for ALL children during 2007. \$
7. Indicate your portion of ALL OTHER 2007 UNTAXED INCOME. Untaxed income refers to IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 - total of lines 28 and 32 or 1040A - line 17, or any contributions 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-12d, codes D, E, F, G, H, and S. Also include nontaxable sick or combat pay, W-2 Form codes J and Q. Include untaxed portions of 401(k) and 403(b) plans, etc., workers' compensation, tax-exempt interest income, veterans' noneducational benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC), etc., housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits), untaxed portion of pensions, annuities or IRA distributions (excluding rollovers), foreign income exclusion from Form 2555 - line 45 or Form 2555-EZ - line 18, cash support or any money paid on your behalf including support from a noncustodial parent or any other person (EXCLUDING CHILD SUPPORT REPORTED PREVIOUSLY), credit for Federal Tax on Special Fuels from IRS Form 4136 - line 18 (nonfarmers only), and any other untaxed income and benefits such as Black Lung Benefits, Refugee Assistance, untaxed portion of railroad retirement benefits, VA Educational Work-Study allowances, etc. \$

8. Enter the amount of Earned Income Credit shown on the 2007 U.S. Income Tax Return (Form 1040 – line 66a; Form 1040A – line 40a; Form 1040EZ – line 8a; or Form 1040X – line 13) and additional child tax credit from IRS Form 1040, line 68, or 1040A, line 41. \$ _____

NOTE: If your anticipated 2008 income will be less than your 2007 income as reported on this form, provide an explanation for the reduction.

9. Enter the total yearly amount of gross taxed income (wages, salaries, tips, severance pay, pensions and annuities, alimony which will be received, unemployment compensation, interest and dividend income, business or farm income, capital gains, income from rents received after expenses for mortgage interest, taxes, and insurance, and all other taxed income [prior to deductions, adjustments, or exemptions] you expect to receive from January 1, 2008 until December 31, 2008. Do not provide weekly or monthly amounts, only yearly totals. IF NONE, ENTER ZEROS. \$ _____
10. Enter the total yearly amount of untaxed income which you and your dependent children, if any, expect to receive from January 1, 2008 until December 31, 2008. Include child support or maintenance payments which will be received for you and ALL children, cash support or any money paid on your family's behalf (this includes college expenses, general living expenses, etc.) Social Security benefits (SSI or disability) you receive plus amounts to be received for all children, and any other untaxed income, as described in questions 7 and 8. Do not provide weekly or monthly amounts, only yearly totals. DO NOT include any income already reported in question 9. IF NONE, ENTER ZEROS. \$ _____
11. Indicate your spouse's current physical address (no P.O. Boxes).

12. Write in the number of people that you will support between July 1, 2008 and June 30, 2009. Include yourself and your children if they get more than half of their support from you or if they would be required to provide your information when applying for Title IV Federal Student Aid. Include other people only if they meet the following criteria: they now live with you and they receive more than half of their support from you and they will continue to be provided with more than half of their support from July 1, 2008 through June 30, 2009. (Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, payment of college costs, etc.) _____
13. Write in the number of people from question 12, including yourself, who will be a college student between July 1, 2008 and June 30, 2009. Include only students enrolled at least half-time (defined as at least 6 semester credit hours, 12 clock hours per week, etc.) in 2008-09. The student must be enrolled in a program that leads to a college degree or certificate. _____

THE PENALTY FOR SUBMISSION OF FRAUDULENT INFORMATION ON THIS FORM MAY BE REPAYMENT OF TRIPLE ANY AMOUNT OF MONEY RECEIVED PLUS A FINE AND/OR IMPRISONMENT.

Signature of Student

Date