



State Grant and Special Programs
 Phone: 1-800-692-7392 Fax: 717-720-3786

**2010-11 UNTAXED INCOME VERIFICATION FORM
 (DEPENDENT STUDENT)**

(NOTE: Deadline for returning this form and 2009 tax documents to PHEAA is April 1, 2011.)

 Print Student's Name

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Student's Social Security Number

OR

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Student's Account Number

2010-11

The Pennsylvania Higher Education Assistance Agency (PHEAA) requests that this form be completed, signed and returned to the Agency. Additionally, PHEAA REQUIRES A COMPLETE COPY OF THE 2009 U.S. INCOME TAX RETURN THAT YOUR PARENT(S) FILED WITH IRS IF SUCH HAS NOT BEEN PREVIOUSLY SUBMITTED. THIS INCLUDES ALL OF THE SUPPORTING FORMS AND SCHEDULES, AND ALL 2009 WAGE AND TAX STATEMENTS (W-2 FORMS). EACH W-2 FORM SHOULD CONTAIN FIGURES IN BOX 1 AND EITHER BOX 16 OR BOX 18. IF YOUR PARENT(S) HAVE AN INTEREST IN A CORPORATION AND/OR PARTNERSHIP, YOU ALSO NEED TO SUBMIT COPIES OF THE MOST RECENT U.S. PARTNERSHIP AND/OR CORPORATION TAX RETURN(S), INCLUDING THE COMPLETED BALANCE SHEET(S) AND K-1 SCHEDULE(S). YOU MAY HAVE ALREADY SUBMITTED TAX DOCUMENTS TO YOUR SCHOOL, BUT PHEAA REQUIRES A COPY AS WELL. THIS INFORMATION AND THE COMPLETED FORM SHOULD BE SENT TO PHEAA, P.O. BOX 8157, HARRISBURG, PA 17105-8157 WITHIN 30 DAYS. If you have questions concerning this matter, please contact Agency staff toll-free at 1-800-692-7392 (TDD for hearing impaired ONLY: 717-720-2366). You will be notified of your eligibility or change in eligibility upon receipt and review of this correspondence by PHEAA staff.

Indicate the total amount of 2009 untaxed income from EACH of the sources listed below. Do not include any taxed income reported on the 2009 U.S. Income Tax Return. IF ZERO APPLIES, PLEASE ENTER ZEROS. DO NOT PROVIDE MONTHLY AMOUNTS.

	Student	Parent(s)
a. 2009 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 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$ _____	\$ _____
b. 2009 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 all children in 2009. Do not include foster or adoption payments.	\$ _____	\$ _____
d. 2009 tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.	\$ _____	\$ _____
e. 2009 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. 2009 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.	\$ _____	\$ _____

