



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

2010-11 UNTAXED INCOME VERIFICATION FORM
(INDEPENDENT STUDENT)

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

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

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 YOU (AND YOUR SPOUSE, IF MARRIED) FILED WITH IRS IF SUCH HAS NOT BEEN PREVIOUSLY SUBMITTED.

- 1. 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.
a. 2009 payments to tax-deferred pension and savings plans...
b. 2009 IRA deductions and payments to self-employed SEP, SIMPLE, Keogh...
c. Child support received for all children in 2009...
d. 2009 tax exempt interest income from IRS Form 1040-line 8b...
e. 2009 untaxed portions of IRA distributions from IRS Form 1040-lines...
f. 2009 untaxed portions of pensions from IRS Form 1040-lines...
g. 2009 untaxed portion of unemployment compensation...

- h. Housing, food, and other living allowances paid to members of the military (excluding on-base housing or housing allowances), clergy and others (including cash payments and cash value of benefits) which were received in 2009. \$ \_\_\_\_\_
- i. 2009 veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. \$ \_\_\_\_\_
- j. Other 2009 untaxed income not reported elsewhere on this form, such as workers' compensation, disability, etc. Do not include 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, or benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. \$ \_\_\_\_\_
- k. Money received, or paid on your family's behalf (e.g., bills, living/college expenses, etc.) in 2009 not reported elsewhere on this form. \$ \_\_\_\_\_

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

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date