



State Grant and Special Programs
Phone: 1-800-692-7392 Fax: 717-720-3786
P.O. Box 8157, Harrisburg, PA 17105-8157

2020-21 UNTAXED INCOME VERIFICATION FORM
(INDEPENDENT STUDENT)

(NOTE: Deadline for returning this form and 2018 tax documents to PHEAA is April 1, 2021.)

Print Student's Name

Student's Account Number grid

Student's Account Number

OR

Student's Social Security Number grid

Student's Social Security Number
2020-21

The Pennsylvania Higher Education Assistance Agency (PHEAA) requests that this form be completed, signed, and returned to the Agency along with the requested tax documents or reason why tax documents were not filed. 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 are unable to respond within 30 days, please note that no information can be accepted after April 1, 2021.

- A signed copy of your and your spouse's, if married, 2018 U.S. Income Tax Return(s) along with any other supporting Forms and Schedules.
Copies of ALL 2018 Wage and Tax Statements (W-2 forms).
A copy of each 2018 Form 1099 (other than Interest and Dividends).
A copy of the appropriate U.S. Partnership and/or Corporation Tax Return(s), including completed balance sheet(s) and K-1 schedules

If you and/or your spouse (if married) did not file a 2018 U.S. Income Tax Return, you must provide a reason as to why the tax return was not filed along with completing the sections below.

a). Provide the reason(s) you and/or your spouse did not file a 2018 U.S. Income Tax Return.

Blank lines for providing reasons for not filing a tax return.

1. Indicate the total amount of 2018 untaxed income from EACH of the sources listed below. Do not include any taxed income reported on the 2018 U.S. Income Tax Return. IF ZERO APPLIES, PLEASE ENTER ZEROS. DO NOT PROVIDE MONTHLY AMOUNTS.

a. 2018 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 \$

