

# Student's 2006 Untaxed Income Worksheet (UTXS06)

Complete this worksheet reporting sources of untaxed income that you (and your spouse) received in 2006. Do not report monthly amounts. Write in calendar year 2006 values. If your answer to any item is "none" or "zero" write a zero in the answer space. DO NOT LEAVE ANY ITEM BLANK.

- \$ \_\_\_\_\_ **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 [401(k), 403(b), 408(k)(6), 501(c)(18)(D), 457(b) and 408(p) SIMPLE plans]**.
- + \_\_\_\_\_ **Child support received** for all children. Do not report monthly amounts; write in the total received for 2006. Report payments received as a result of court order as well as voluntarily provided.
- + \_\_\_\_\_ **Untaxed Social Security Benefits including Supplemental Security Income.** Do not report monthly amounts; write in the total received for 2006. Include benefits received by you or by your spouse on behalf of any other household member.
- + \_\_\_\_\_ **Earned income credit** from IRS Form 1040-line 66a; 1040A-line 40a; or 1040EZ-line 8a.
- + \_\_\_\_\_ **Additional child tax credit** from IRS Form 1040-line 68 or 1040A-line 41.
- + \_\_\_\_\_ **Welfare benefits**, including Temporary Assistance for Needy Families (TANF). Do not include food stamps or subsidized housing.
- + \_\_\_\_\_ **Money received, or paid on your behalf** (e.g., bills, gifts) not reported elsewhere on the FAFSA.
- + \_\_\_\_\_ **IRA deductions and payments to self-employed SEP, SIMPLE, Keogh** and other qualified plans from IRS Form 1040-total of lines 28 plus 32 or 1040A-line 17.
- + \_\_\_\_\_ **Untaxed portions of IRA and pension distributions** from IRS Form 1040-lines (15a minus 15b) plus (16a minus 16b); or 1040A-lines (11a minus 11b) plus (12a minus 12b). **Exclude rollovers.**
- + \_\_\_\_\_ **Tax exempt** interest income from IRS Form 1040-line 8b or 1040A-line 8b.
- + \_\_\_\_\_ **Housing, food and other living allowances** paid to members of the military, clergy and others. Include cash payments and cash value of benefits.
- + \_\_\_\_\_ **Workers' Compensation** (Do not include unemployment compensation).
- + \_\_\_\_\_ **Credit for federal tax on special fuels** from IRS Form 4136-line 20--**nonfarmers only**.
- + \_\_\_\_\_ **Veterans' noneducation benefits** such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.
- + \_\_\_\_\_ **Foreign income exclusion** from IRS Form 2555-line 45 or 2555EZ-line 18.
- + \_\_\_\_\_ **Any other untaxed income and benefits** not reported elsewhere. **Do not include** student aid, benefits from flexible spending arrangements (e.g., cafeteria plans), veterans' education benefits, state foster care and adoption assistance, or WIA. **List Source(s):** \_\_\_\_\_

\$ \_\_\_\_\_ **Total 2006 Untaxed Income**                      Student's Signature \_\_\_\_\_

**THIS FORM MUST BE SIGNED**                                      Student's ID# \_\_\_\_\_

Return to: Financial Aid Office  
Michigan Tech  
or Fax: 906-487-3042