



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

2009-10 UNTAXED INCOME VERIFICATION FORM
(DEPENDENT STUDENT)

(NOTE: Deadline for returning this form and 2008 tax documents to PHEAA is April 1, 2010.)

Print Student's Name

Grid for Student's Social Security Number

Student's Social Security Number

OR

Grid for Student's Account Number

Student's Account Number

2009-10

IN ADDITION TO COMPLETING THIS FORM, PHEAA REQUIRES A COMPLETE COPY OF THE 2008 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 2008 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 8141, HARRISBURG, PA 17105-8141 WITHIN 30 DAYS.

Indicate the total amount of 2008 untaxed income from EACH of the sources listed below. Do not include any taxed income reported on the 2008 U.S. Income Tax Return. IF ZERO APPLIES, PLEASE ENTER ZEROS. DO NOT PROVIDE MONTHLY AMOUNTS.

Table with 3 columns: Description, Student, Parent(s). Rows include: 2008 payments to tax-deferred pension and savings plans, 2008 IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS, Child support received for all children in 2008, 2008 tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b, 2008 untaxed portions of IRA distributions from IRS, 2008 untaxed portions of pensions from IRS Form 1040-lines.



