



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

2009-10 ADDITIONAL FINANCIAL INFORMATION CLARIFICATION FORM
(NOTE: Deadline for returning this form and 2008 tax documents to PHEAA is April 1, 2010.)

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

2009-10

The Pennsylvania Higher Education Assistance Agency (PHEAA) requires additional information with regard to your family's income. Please submit the following data to PHEAA, P.O. Box 8141, Harrisburg, PA 17105-8141 within 30 days. If you are unable to respond within 30 days, please note that no information can be accepted after April 1, 2010.

Please provide a complete copy as filed with IRS of your (and your spouse's if married) and your parents' (if you are considered by PHEAA a dependent of your parents) 2008 U.S. Income Tax Return. This includes all 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 you (and your spouse, if married) and your parents (if you are considered by PHEAA a dependent of your parents) 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. Also complete questions a through e.

- a. Educational credits (Hope and Lifetime Learning tax credits) from 2008 IRS Form 1040-line 50 or 1040A-line 31.

Student's (and spouse's, if applicable) \$ Parents' \$

- b. Child support you paid or your parents paid because of divorce or separation or as result of legal requirement. Do not include support for children in your (or your parents') household, as reported in your family's household size.

Student's (and spouse's, if applicable) \$ Parents' \$

- c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

Student's (and spouse's, if applicable) \$ Parents' \$

- d. Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Include AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. You must provide verification that these amounts have been included on your or your parent(s)' tax return.

Student's (and spouse's, if applicable) \$ Parents' \$



