



# 2020-2021 Student Untaxed Income Worksheet

OFFICE OF STUDENT FINANCIAL PLANNING

Student

Name \_\_\_\_\_ Student ID # \_\_\_\_\_ Date \_\_\_\_\_

## A. FAFSA - Student Untaxed Income

We must have the following information to complete the processing of your 2020-2021 Financial Aid application. **PLEASE NOTE: Financial Aid is awarded on a first come first serve basis; therefore, it is very important to send us the necessary information immediately. We cannot complete your application until this information is returned.** If you have any questions concerning this form or the financial aid process, please call our office at 515-271-2905 or toll-free at 1-800-44-DRAKE.

The **Student** Untaxed Income Section of your financial aid application was received as incomplete **OR** there was an inconsistency in the information you provided. Please complete the following questions for the calendar year 2018. **(If the answer is NONE, please write ZERO.)**

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. <b>Don't include</b> amounts reported for code DD (employer contributions from health benefits).	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1-total of lines 28 + 32	\$
Child support <b>received</b> for any of your children. <b>Don't include</b> foster care or adoption payments.	\$
Tax exempt interest income from IRS Form 1040—line 2a	\$
Untaxed portions of IRA distributions and pensions from IRS Form 1040—line 4a minus line 4b. <b>Exclude rollovers.</b> If negative, enter zero here.	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits) <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$
Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-study allowances	\$
Other untaxed income not reported in items Student Other Untaxed Income section, such as workers' compensation, disability, etc. Also include the health savings account deduction on IRS Form 1040-schedule 1-line 25. <b>Don't include</b> extended foster care benefits, 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, benefits from flexible spending arrangements, (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$

If there was an inconsistency in the original amounts you stated on the FAFSA, please provide a written explanation stating why the original FAFSA had incorrect information. If additional space is needed for the explanation, please use the back of this form or attach a separate sheet of paper. **Please include student's name and Drake ID number on any separate sheets of paper.**

## B. Signature

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Submit this worksheet to: [finaiddocs@drake.edu](mailto:finaiddocs@drake.edu) or mail/fax to:  
Office of Student Financial Planning • Drake University • 2507 University Ave • Des Moines, IA 50311  
Toll Free: 1-800-443-7253 (Option 3) • Phone: 515-271-2905 • FAX: 515-271-4042 •

Please be sure to update your **mailing** address and phone number if they have changed. To do this, log into My Drake Home and on the home tab choose the MyDUSIS link and then personal information. If you would prefer to do by phone, call Registrar at [515-271-2025](tel:515-271-2025).