

## 2016-2017 STUDENT/SPOUSE INCOME/EXPENSE VERIFICATION FORM

Student UCM ID \_\_\_\_\_ Phone Number \_\_\_\_\_

Student Full Name \_\_\_\_\_  
 First Name \_\_\_\_\_ Last Name \_\_\_\_\_ M.I. \_\_\_\_\_

### SECTION A: Student/Spouse Taxable and Untaxed Income

Please list student/spouse taxable and untaxed income for the twelve (12) month period of If January 1, 2015 through December 31, 2015 below. If the answer is zero or does not apply to you, enter "0". DO NOT LEAVE BLANKS.

**You must submit a completed copy of your 2015 Federal Tax Transcript and W-2(s) if you have not already done so, if applicable.**

*Note:* You may be required to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed.

Gross income earned from work by student (wages, salaries, tips) \_\_\_\_\_

Gross income earned from work by spouse (wages, salaries, tips) \_\_\_\_\_

Check here if you received subsidized low-income housing such as HUD, Section 8, etc. (Do not include those benefits below.)

Taxable Income	Monthly	Annual	Untaxed Income	
			Monthly	Annual
Interest & dividend income			Payments to tax deferred pension and savings plan	
Alimony			IRA, Keogh, SEP, SIMPLE contributions	
Net business/farm income			Child support received	
Capital Gains (or loss)			Tax exempt interest	
Other gains (or loss)			Untaxed IRAs/pension distributions, excluding rollovers	
Retirement/pension benefits			Housing, food and other living allowances (Including cash payments and cash value of benefits.)	
Rental property, royalties, partnership, S corporation, trust			Do not include subsidized low income housing, food stamps, TANF, Social Security or Foreign Income Exclusion	
Farm Income			Veteran's non-education benefits	
Unemployment Compensation			Disability Compensation Worker's Compensation	
Taxed Social Security benefits			Money received or paid on your behalf	
			Any other income or benefits	
Paid lump sum benefits: retirement, vacation, sick pay, etc.			Specify <input type="text"/>	
			<b>Total Income:</b>	

Student UCM ID \_\_\_\_\_

Student Full Name \_\_\_\_\_  
 First Name Last Name M.I.

**SECTION B: Student/Spouse Expenses**

Student/Spouse estimated income for the twelve (12) month period of January 1, 2015 through December 31, 2015. You must also submit a completed copy of your 2015 Federal Tax Transcript and W-2(s) if applicable and if you have not already done so.

Type of Expense	Monthly	Annual	Type of Expense (cont)	Monthly	Annual
Rent or Mortgage Payment			Consumer debts and/or other personal loans		
Property Tax			Child support paid by the student/spouse		
Utilities (gas, electric, phone)			Do not include support paid for children living in your home, or for the UCM Student		
Food and household items			Private school tuition (attach documentation).		
Car and/or transportation (car payments, insurance, gas, repairs and maintenance, bus)			Vacation and recreation expenses		
			Any other expenses		
Medical and Dental (not covered by insurance)			Specify:		
Health Insurance Premiums			Please do not include federal or state taxes as these are already taken into account		
Child care and/or elder care			<b>Total Expenses:</b>		

**SECTION C: Student/Spouse Income Statement**

If expenses exceed income, explain how you met your expenses **below** or on a separate piece of paper and attach it to this document.

**SECTION D: Student/Spouse Certification**

I hereby declare that all information reported on this document is true, complete, and accurate to the best of my knowledge. I understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal and/or repayment of financial aid and referral to the appropriate authorities. This document must be postmarked by June 1, 2016 to be considered for maximum eligibility of aid.

\_\_\_\_\_  
 Student Signature Date Spouse Signature Date

Reminders:

- Attach copies of documentation to provide proof of your situation.
- Write student name and student I.D. number on all documents submitted.
- Awards will not be given until we have reviewed your documents and verified your eligibility.
- Payments will not disburse until we have reviewed your documents and verified your eligibility.