

**A. Student Information**

<b>Last name</b>	<b>First Name</b>	<b>M.I.</b>	<b>Social Security Number</b>
<b>Address (include apt. no.)</b>			<b>Date of Birth</b>
<b>City</b>	<b>State</b>	<b>Zip Code</b>	<b>Phone Number (include area Code)</b>

**B. Family Information - Follow these instructions carefully.**

List *only* the following people in your household:

- yourself
- your spouse, if you have one
- your children, *if* you will provide more than half of their support from July 1, 2008 through June 30, 2009.
- other people **only if** they now live with you, **and** you provide more than half of their support **and** will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.

Write the names of all household members in the space(s) below that meet the requirements listed above. Also, write in the name of the college for any household member, who will be enrolled in a degree or certificate program and attending college at least half-time between July 1, 2008 and June 30, 2009. If more space is needed, attach a separate page and include all information requested.

Full Name	Date of Birth MM / DD / YY	Relationship	Name of College (only if attending half time or more)
		<b>Self</b>	<b>San Jacinto College</b>

**C. Student's Marital Status (check only one)**     single     married     separated     divorced     widow/widower

Month and year you were married: \_\_\_\_\_ Month and year you separated: \_\_\_\_\_ Month and year you were divorced: \_\_\_\_\_

**D. Student's Tax Forms (check only one and provide the required document)**

- I have already completed my 2007 tax return. Check and submit a **signed** copy of your 2007 tax return including forms, schedules, and W-2s.
- I will file, but I have not yet completed my return. I understand that consideration for financial aid will not be processed until I provide the school a **signed** tax return, which includes all forms, schedules and W-2s. My 2007 tax return will be submitted to the school by \_\_\_\_\_.
- I am not going to file a 2007 tax return. Check and submit all W-2s and/or 1099 Statements.
- I did not work during 2007. List all untaxed income on back page.

**E. Spouse's Tax Forms (complete only if student is married; check only one and provide the required document)**

- A joint return was filed with my spouse.
- My spouse filed a separate 2007 tax return. Check and submit a copy of your spouse's 2007 tax return including forms, schedules, and W-2s that is **signed** by your spouse.
- My spouse will file a 2007 tax return. I understand that consideration for financial aid will not be processed until I provide the school a tax return, which includes all forms, schedules and W-2s that is **signed** by my spouse. Spouse's 2007 tax return will be submitted to the school by \_\_\_\_\_.
- My spouse is not going to file a 2007 tax return. Check and submit all W-2s and/or 1099 Statements.
- My spouse did not work during 2007. List all untaxed income on back page.

**Make sure that tax forms are signed.**

**Over to complete required information and to provide required signatures**

Independent

Student's Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

<b>Worksheet A - Report 2007 Annual Amounts</b>	
\$	Earned income credit from IRS Form 1040-line 66a; 1040A-line 40a; 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). Don't include food stamps or subsidized housing. [Report annual amounts, not monthly amounts.]
\$	Social Security benefits received for all household members that were not taxed (such as SSI). Report benefits paid directly to the student or spouse in the Student and Spouse column.
\$	Total Worksheet A

<b>Worksheet B - Report 2007 Annual Amounts</b>	
\$	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.
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of line 28 + line 32 or 1040A-line 17.
\$	Child support you <b>received</b> for all children. Don't include foster care or adoption payments.
\$	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.
\$	Foreign income exclusion from IRS Form 2555-line 45 or 2555EZ-line 18.
\$	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A lines (12a minus 12b). Exclude rollovers. If negative, enter zero here.
\$	Credit for federal tax on special fuels from IRS Form 4136-line 17 (non-farmers only).
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).
\$	Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.
\$	Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI. Don't include student aid, Workforce Investment Act educational benefits, combat pay if not a tax filer, or benefits from flexible spending arrangements, e.g., cafeteria plans.
\$	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.
\$	Total Worksheet B

<b>Worksheet C - Report 2007 Annual Amounts</b>	
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31.
\$	Child support you or your spouse <b>paid</b> because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household that are listed on the other side of this form.
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Include AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.
\$	Total Worksheet C

**F. Sign this Worksheet** By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.

Student's signature required: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's signature (optional): \_\_\_\_\_ Date: \_\_\_\_\_

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

**Submit this worksheet to your Campus Financial Aid Services Office.**

**Note: All documents and forms submitted become the property of San Jacinto College and cannot be returned. Please make copies for your records before submitting the required information to the Campus Financial Aid Services Office.**