

2020 - 2021 FAFSA Worksheet

(Keep for your records)

2018

Name(s) as shown on return

Tax ID Number

The Free Application for Federal Student Aid (FAFSA) requires financial information of the student and the parents of the student. This worksheet lists information from the tax return that can be used when completing your FAFSA application. If the taxpayer is the student, use the information in Step Two to complete Step Two of the FAFSA. If the taxpayer is the parent of the student, use the information in Step Four.

Step Two (Use only if the taxpayer listed at the top of the page is the student)

Use this information when answering questions 33-45.

- 33. Student's tax return type: 33.
34. Student's filing status*: 34.
35. RESERVED 35.
36. Student's adjusted gross income: 36.
37. Student's income tax for 2018: 37.
38. Student's exemptions for 2018: 38.
39. Student's earnings from working in 2018: 39.
40. Student's spouse's earnings from working in 2018: 40.
44a. Education credits: 44a.
44d. Taxable student grant and scholarship aid reported in AGI: 44d.
45a. Payments to tax-deferred pension and retirement savings plans: 45a.
NOTE: Add any direct payments not shown on Form W-2 to this amount.
45b. IRA deductions and payments to SEP, SIMPLE, and other qualified plans: 45b.
45d. Tax-exempt interest income from line 2a of Form 1040 45d.
45e. Untaxed portions of IRA distributions (excluding rollovers): 45e.
45f. Untaxed portion of pensions (excluding rollovers): 45f.
45g. Clergy/Military living allowances for housing, food, and other 45g.
45i. Untaxed portion of Health Savings accounts. Add this amount to any other untaxed income not reported on lines 45a - 45h, and enter on line 45i of FAFSA: 45i.

Certain circumstances may require additional amounts not included here. For example, if a student's marital status changes after this return is filed, and before completing the FAFSA, then the information for the spouse of the student may need to be included or excluded on the FAFSA. See the FAFSA instructions for further information on this and other possible circumstances.

*Line 34 - "S" = Single, "MFJ" = Married Filing Joint, "MFS" = Married Filing Separate, "HOH" = Head of Household, "QW" = Qualifying Widow(er)