

## 2009-2010 UCLA GRADUATE STUDENT SUPPORT FINANCIAL STATEMENT

You must complete this form with the attached answer sheet if you have accepted fellowships, grants, fees or tuition for 2009-2010. Your award is based on academic merit, but may be paid from a variety of sources, some of which require financial data. In order to use our resources to the maximum benefit of graduate students, we must ask you for this information. It will be kept confidential and will not affect the amount of support you receive. Some of the information, which is requested, on this form should be taken from your 2008 U.S. income tax return. If you have not yet filed one, it is recommended that you do so before filling out this form.

1. Please answer the following questions on the answer sheet.
2. Each numbered question has a corresponding numbered section on the answer sheet where you are to fill in your answer.
3. Please fill in blanks in each column as zeroes.
4. To the right is an example.
5. After having filled in the answer sheet, please return it to:

1. 

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UCLA Graduate Student Support  
1228 Murphy Hall  
Box 951444  
Los Angeles, CA 90095-1444

You may keep this question packet for your records.

1. **Student I.D. number** - Write the nine digit Student I.D. number given to you upon admission on the answer sheet.
2. **Citizenship status** – Check the box next to the letter A on the answer sheet if you have visa that matches the series listed below. All others STOP HERE, this form does not apply; Please complete a FAFSA form available at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).
  - A. F, J, Q, M series visa (e.g. F-1, J-1, F-2)
3. **California Tuition Residency status** - Are you considered a California Resident for **tuition purposes** (not tax purposes) by the UCLA Office of the Registrar? Check the box next to “**Resident**”, or “**Non-resident**” on the answer sheet.
4. **Marital status as of today**- Your marital status. Check the box next to the corresponding letter on the answer sheet.
  - A. Married/Remarried
  - B. Separated
  - C. Single, Divorced, or Widowed
5. **Housing status** - Where will you be living during the 2009-2010 academic year? Check the box next to the corresponding letter on the answer sheet.
  - A. On campus housing
  - B. Off campus housing
  - C. Off campus housing - Parent’s home
  - D. Off campus housing - Relative’s home
6. **Number of dependents for 2009-2010** - Total number you will support from 7/1/09 to 6/30/10, including yourself and your spouse. Include your (and your spouse’s) children and any other people who live with you and get more than half their support from you. Write in the number on the answer sheet. **If you have fewer than ten dependents please fill in the first digit as a zero.**

- 7. Number of dependent college students for 2009-2010** - Total number of dependents from question 6 (including yourself) who will be attending college for at least half the time. Write in the number on the answer sheet. **If you have fewer than ten dependent college students please fill in the first digit as a zero.**

**Take the following information from your 2008 U.S. income tax return.**

If you have not yet filed one, it is recommended that you do so before filling out this form. If you are currently divorced, but you filed (or will file) a joint tax return for 2008, give only your portion of the exemptions, income and taxes paid asked for in questions 9 through 19. If you are married and you and your spouse filed (or will file) separate tax returns for 2008, be sure to include both your and your spouse's exemptions and income in questions 9 through 19, even if you were not married in 2008.

- 8. Information Source** - Which income tax return did you file or will you file for 2008? Fill in the box next to the corresponding letter on the answer sheet.
- A. Completed 1040EZ / 1040A / 1040NR-EZ
  - B. Completed 1040 / 1040NR
  - C. Estimated 1040EZ / 1040A /1040NR-EZ
  - D. Estimated 1040/1040NR
  - E. Did not (or will not) file Tax return
- 9. Total Number of exemptions for 2008** - Write in the number from Form 1040 or 1040A line 6d, or 1040NR line 7d. If you (and your spouse) used the 1040EZ and answered "Yes" on Form 1040EZ line 5, use the 1040EZ worksheet line F to determine the number of exemptions (\$3,500 equals one exemption). If you answered "No" enter "01" if you are single or "02" if you are married. If you used the 1040 NR-EZ and checked the box on line1, enter "01"; if you checked the box on line 2, enter "02". Write in the number of exemptions on the answer sheet. **If you claimed less than ten exemptions please fill in the first digit as a zero.**
- 10. Adjusted Gross Income (AGI) for 2008** - Write in the amount from IRS Form 1040 line 37, Form 1040A line 21, Form 1040EZ line 4, Form 1040NR line 35, Form 1040NR-EZ line 10.
- 11. U.S. Income tax paid 2008** - Write in the amount from IRS Form 1040 line 56, Form 1040A line 35, Form 1040EZ line 11, Form 1040NR line 57, or Form 1040NR-EZ line 17.
- 12. Work income earned by student in 2008** - Include the "wages, salaries, tips, etc." from your Form 1040 line 7+12+18, Form 1040A line 7, Form 1040EZ line 1, Form 1040NR line 8+13+19, or Form 1040NR-EZ line 3. If you and your spouse filed a joint return, report your and your spouse's earnings separately. **If you are not a tax filer**, include your earnings from work in 2008. Add up the earnings from your W-2 Forms and any other earnings from work that are not included on the W-2 Form. Write the total amount on the answer sheet.
- 13. Work income earned by student's spouse in 2008** - Include all of the information from the sources mentioned in question 12 which corresponds to your spouse. Write in the amount on the answer sheet.
- 14. Earned Income Credit** - Report the total amount of your (and your spouse's) Earned Income Credit from Form 1040 line 66a, Form 1040A line 40a, or Form 1040EZ line 8a. Write in the amount on the answer sheet.
- 15. Social Security Benefits** - Report the amount of untaxed social security benefits (including Supplemental Security Income) that you (and your spouse) got in 2008. Don't include any benefits reported in question 14. Don't report monthly amounts, report the total for 2008. Write in the amount on the answer sheet.
- 16. Welfare benefits, including Temporary Assistance for Needy Families (TANF)** - Report the total amount received for 2008. Do not report monthly amounts. Write in the total amount on the answer sheet.
- 17. Child support received for all children** - Report the total amount received for 2008. Write in the amount on the answer sheet.

**18. Other untaxed income and benefits** - Use the following worksheet to answer this question.

IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040—lines 28 + line and 32, or 1040A line 17, or 1040NR— line 27 + line 31.	\$
Untaxed portions of IRA/pensions from 1040—lines (15a minus 15b) and (16a minus 16b), or 1040A—lines (11a minus 11b) and (12a minus 12b). 1040NR—lines (16a minus 16b) and (17a minus 17b). Exclude Rollovers. If negative, enter zero here.	\$
Credit for Federal tax on special fuels from IRS Form 4136 – line 20 (nonfarmers only)	\$
Foreign income exclusion from Form 2555 line 45 or Form 2555EZ line 18.	\$
Tax exempt interest income from Form 1040 line 8b, 1040A line 8b, or 1040NR line 9b	\$
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.	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$
Money received, or paid on your behalf (e.g.,bills), not reported elsewhere on this form	\$
Any other untaxed income and benefits, such as Workers' Compensation, Disability, Black Lung Benefits, Refugee Assistance, or untaxed portions of Railroad Retirement Benefits, VA Educational Work-Study allowances, or wages not subject to taxation by any government. Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$
<b>Total</b> - Write this amount on the space provided for question 18 on the answer sheet, then fill in the corresponding circles.	\$

**19. Other income** - Use the following worksheet to answer this question.

Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
Education credits (Hope and Lifetime Learning Tax Credits) from Form 1040 Line 50: or 1040A line 31.	\$
Child support <b>PAID</b> because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parent's) household.	\$
<b>Total</b> - Write this amount on the space provided for question 19 on the answer sheet, then fill in the corresponding circles.	\$

**Asset Information**

- 20. As of today, what is your (and your spouse's) total current balance of Cash, savings, and checking accounts** - Write in the amount on the answer sheet. Do not include student financial aid.
- 21. As of today, what is the net worth of your (and your spouse's) investments, including real state (not your home)?** Net worth means current value minus debt.
- 22. As of today what is the net worth of your (and your spouse's) current business and/or investment farms?**  
**Do not include** the value of a family farm that you (and your spouse) live on and operate.  
**Do not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, include (1) persons directly related to you, such as parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

You are finished. Please sign, date, and return your answer sheet to 1228 Murphy Hall.