

## 2011-2012 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 2011-2012. 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 2010 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? (i.e. AB540 qualifies for California Resident status). 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. Single
  - B. Married/Remarried
  - C. Separated
  - D. Divorced, or Widowed
5. **Housing status** - Where will you be living during the 2011-2012 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 2011-2012** - Total number you will support from 7/1/11 to 6/30/12, 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 2010-2011** - 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 2010 U.S. income tax return.**

Answer questions about yourself (the student). If you are single, separated, divorced or widowed, answer only about yourself. If you are married or remarried as of today, include information about your spouse (husband or wife).

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 2010, 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 2010, 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 2009.

- 8. Information Source** – What income tax return did you file or will file for 2010? 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. Adjusted Gross Income (AGI) for 2010** - Write in the amount from IRS Form 1040 line 37, Form 1040A line 21, Form 1040EZ line 4, Form 1040NR line 36, Form 1040NR-EZ line 10.
- 10. U.S. Income tax paid 2010** - Write in the amount from IRS Form 1040 line 55, Form 1040A line 35, Form 1040EZ line 11, Form 1040NR line 68, or Form 1040NR-EZ line 21.
- 11. Total Number of exemptions for 2010** - Write in the number from Form 1040 or 1040A line 6d, or 1040NR line 7d. On the 1040EZ, if a person didn't check either on line 5, enter 01 if he or she is single, or 02 if he or she is married. If a person checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$3,650 equals one exemption). If you used the 1040 NR-EZ and checked the box on line 1, 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.**
- 12. Work income earned by student in 2010** – how much did you earn from working in 2010?
- 13. Work income earned by student's spouse in 2010** – how much did your spouse earn from working in 2010?
- 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 9a. 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 2010. Don't include any benefits reported in question 14. Don't report monthly amounts, report the total for 2010. Write in the amount on the answer sheet.
- 16. Welfare benefits, including Temporary Assistance for Needy Families (TANF)** - Report the total amount received for 2009. 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 2010. Write in the amount on the answer sheet.

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

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—lines 28 + line 32, or 1040A line 17, or 1040NR— line 28 + line 32.	\$
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.	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$
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	\$
Credit for Federal tax on special fuels from IRS Form 4136 – line 17 (non-farmers only)	
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.	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$
<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 49: or 1040A line 31.	\$
Child support paid 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. Write in the amount on the answer sheet.

**22. As of today what is the net worth of your (and your spouse's) current business and/or investment farms?** Do not include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

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