Untaxed Income and Exclusions Form 2026-2027

Student Name _____ Student PID (Pxxxxxxxxx) _____

Written Student Signature (Electronic Signature Not Accepted) _____ Date _____

Written Parent Signature (Electronic Signature Not Accepted) _____ Date _____
(Parent signature required for dependent students)

Please list all **Untaxed Income and/or Exclusions** received or reported in the year **2024**, and any **Child Support Received in 2025**. Dependent students should complete both the student and parent columns. If Parent 1 and Parent 2 filed 2024 taxes separately, report their information separately. **Please list ANNUAL amounts. If you did not receive a type of income or exclusion, enter zero.** If you are not married, or your parents are married and filed jointly, write **N/A** on lines for Spouse and/or Parent 2. **Do not leave any lines blank**.

	Student	**Spouse** *(if student is married)*	**Parent 1** *(if student is dependent)*	**Parent 2** *(if 2024 taxes were filed separately from Parent 1)*
Untaxed Income*				
Deductible payments to SEP/SIMPLE/ KEOGH/Other *(Attach 2024 Sch 1)*	$	$	$	$
Tax Exempt Interest *(Attach signed 2024 1040)*	$	$	$	$
Untaxed Portions of IRAs and Pensions *(attach signed 2024 1040 *See below for Rollovers)*	$	$	$	$
Income Exclusions				
Taxable scholarships, grants fellowships reported to IRS in AGI *(attach 2024 Sch 1)*	$	$	$	$
Education Credits *(Attach 2024 Sch 3)*	$	$	$	$
Income Tax Paid *(attach signed 2024 1040)*	$	$	$	$
Untaxed Rollovers of IRAs and Pension Funds *(attach signed 2024 1040 showing ROLLOVER written on Line 4 or Line 5 AND applicable 1099 forms)*	$	$	$	$

Office of Student Financial Aid and Scholarships
Chubb Hall 020
1 Ohio University Drive
Athens, OH 45701-2979

DO NOT SEND COMPLETED DOCUMENTS BY EMAIL. PLEASE USE OUR SECURE UPLOAD PORTAL OR SEND BY MAIL OR FAX.
https://www.ohio.edu/financial-aid/forms

Questions?
financial.aid.verification@ohio.edu
Phone: (740) 593-4141
Fax: (740) 593-4140