

2016-2017 UCLA GRADUATE STUDENT SUPPORT FINANCIAL STATEMENT

You must complete this form with the attached answer sheet if you are applying for certain privately endowed fellowships and are not a US Citizen or Permanent Resident. Awards are 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. Some of the information requested on this form should be taken from your 2015 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 e-mail to gdsupport@grad.ucla.edu or mail/in person:

1.

0	0	1	2	3	4	.00
---	---	---	---	---	---	-----

Graduate Division Fellowships and Financial Services
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 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.
 - 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** - Check the box next to the corresponding letter on the answer sheet.
 - A. Single
 - B. Married/Remarried
 - C. Separated, Divorced, or Widowed
5. **Housing status** - Where will you be living during the 2016-2017 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 2016-2017** - Total number you will support from 7/1/16 to 6/30/17, 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 2016-2017** - 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 2015 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 2015, give only your portion of the exemptions, income and taxes paid asked for in questions 9 through 18. If you are married and you and your spouse filed (or will file) separate tax returns for 2015, be sure to include both your and your spouse's exemptions and income in questions 9 through 18, **even if you were not married in 2015.**

- 8. Information Source** - Which income tax return did you file or will you file for 2015? Fill in the box next to the corresponding letter on the answer sheet.
- A. 1040
 - B. 1040A/1040EZ
 - C. 1040NR/1040NR-EZ
 - D. Did not (or will not) file tax return
- 9. Adjusted Gross Income (AGI) for 2015** - What was your (and your spouse's) adjusted gross income for 2015? Adjusted gross income is on IRS Form 1040-line 37; 1040A-line 21; 1040EZ-line 4; 1040NR-line 36; 1040NR-EZ-line 10.
- 10. U.S. Income tax paid 2015** - Enter your (and your spouse's) income tax for 2015. Income tax amount is on IRS Form 1040-line 63; 1040A-line 39; 1040EZ-line 12; 1040NR-line 61; 1040NR-EZ-line 17.
- 11. Total Number of exemptions for 2015** - Enter your (and your spouse's) exemptions for 2015. Exemptions are on IRS Form 1040-line 6d; Form 1040A-line 6d; Form 1040NR-line 7d. If using 1040NR-EZ and the box on line 1 is checked, enter "01"; if you checked the box on line 2, enter "02". For Form 1040EZ, if a person didn't check either box on line 5, enter "01" if he or she is single or has never been married, 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 (\$4,000 equals one exemption). If you claimed less than ten exemptions, please fill in the first digit as a zero.
- 12. Work income earned by student in 2015** - How much did you earn from working in 2015? This information may be on the W-2 forms, or on IRS Form 1040-lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A-line 7; 1040EZ-line 1; 1040NR-lines 8+13+19; 1040NR-EZ-line 3. If any individual earning item is negative, do not include that item in your calculation. 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 2015. 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 2015** - How much did your spouse earn from working in 2015? 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. Other income - Use the following worksheet to answer this question.

Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040-line 50; 1040A-line 33.	\$
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
Taxable student grant and scholarship aid reported to the IRS in your adjusted gross income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.	\$
Earnings from work under a cooperative education program offered by a college.	\$
Total - Write this amount on the space provided for question 14 on the answer sheet, then fill in the corresponding circles.	\$

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

Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).	\$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-line 28 + line 32; 1040A-line 17; 1040NR-line 28 +line 32.	\$
Child support received for any of your children. Don't include foster care or adoption payments.	\$
Tax exempt interest income from IRS Form 1040-line 8b; 1040A-line 8b; 1040NR-line 9b.	\$
Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b); 1040A-lines (11a minus 11b); 1040NR-lines (16a minus 16b). Exclude rollovers. If negative, enter a zero here.	\$
Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b); 1040A-lines (12a minus 12b); 1040NR-lines (17a minus 17b). Exclude rollovers. If negative, enter a 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). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
Veterans non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
Other untaxed income not reported such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040-line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not part of a legal child support agreement. Also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, and uncles). You must include these distribution amounts.	\$
Total - Write this amount on the space provided for question 15 on the answer sheet, then fill in the corresponding circles.	\$

Asset Information**16. 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. **Don't include** student financial aid.

17. As of today, what is the net worth of your (and your spouse's) investments, including real state? Net worth means current value minus debt. If net worth is negative, enter 0. Investments include real estate (*do not include the home in which you live*), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.**18. As of today what is the net worth of your (and spouse's) current businesses and/or investment farms?**
Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral. **Business value does 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, your family includes (1) persons directly related to you, such as a 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. **Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

You are finished. Please sign, date, and return your answer sheet via e-mail to gdsupport@grad.ucla.edu or via mail/in person:

Graduate Division Fellowships and Financial Services
1228 Murphy Hall
Box 951444
Los Angeles, CA 90095-1444.