

Drake University

Office of Student Financial Planning

Reply to:

Carnegie Hall
 2507 University Avenue
 Des Moines, IA 50311-4506
 515-271-2905
 1-800-44-DRAKE
 Fax: 515-271-4042

Student Name _____

Student Identification # _____

DIVISION OF INCOME AND ASSETS

You have indicated on your son's/daughter's FAFSA that you have had a change in marital status, yet filed a joint 2008 Federal tax return. Please complete the following form, dividing the income and assets accordingly. In cases of dependent students, the custodial parent should complete and sign this form.

| | Reported on 1040, 1040A, or 1040EZ | Mother | Father |
|-------------------------------------------------------------------------------------------------|-----------------------------------------------|---------------|---------------|
| Wages, salaries, etc. | | | |
| Interest income | | | |
| Dividend income | | | |
| Refund of state tax (1/2) | | | |
| Alimony received | | | |
| Business income (loss) | | | |
| Capital gain (loss) | | | |
| Taxable IRA/Pensions | | | |
| Rental income, royalties, etc. | | | |
| Farm income (loss) | | | |
| Unemployment compensation | | | |
| Taxable Social Security Benefits | | | |
| Other Income | | | |
| Educator expenses | | | |
| Certain business expenses of reservists, performing artists, and fee-basis government officials | | | |
| Health Savings Account deduction | | | |
| Moving Expenses | | | |
| One-half of self employment tax | | | |
| Self Employed SEP, & SIMPLE plans | | | |
| Self-employed health insurance ded. | | | |
| Penalty on early withdraw of savings | | | |
| Alimony paid | | | |
| IRA deduction | | | |
| Student Loan Interest deduction | | | |
| Tuition and Fees deduction | | | |
| Domestic Production activities ded. | | | |
| Adjusted Gross Income (AGI) | | | |

| | <u>Reported on FAFSA</u> | <u>Mother</u> | <u>Father</u> |
|-----------------------------------|--------------------------|---------------|---------------|
| Cash, savings, checking | | | |
| Real estate/Investment net worth* | | | |
| Business value net worth* | | | |
| Farm value net worth* | | | |

* Net worth is defined as current or market value minus debt.

Please indicate below which parent the student has lived with more during the past 12 months. If the student did not live with one parent more than the other, please indicate which parent provided more financial support during the last 12 months.

_____ Mother _____ Father

If you have any questions or additional comments, feel free to contact our office or use the space provided below.

Signature of Parent (completing this form)

Date

FOR OFFICE USE ONLY:

_____ / _____ X _____ = _____
new AGI old AGI old tax paid new tax paid

Please be sure to have the student update their **mailing** address and phone number if they have changed. To do this, the student will need to log into blueView and on the home tab choose the MyDUSIS link and then personal information. If the student would prefer to do by phone, call Student Records at [515-271-2025](tel:515-271-2025).