

# Drake University

Office of Student Financial Planning

**Reply to:**

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Student Name \_\_\_\_\_

Student Identification # \_\_\_\_\_

### DIVISION OF INCOME AND ASSETS

You have indicated 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.

	<b>Reported on 1040, 1040A, or 1040EZ</b>	<b>Student</b>	<b>Spouse</b>
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.			

<u>Adjusted Gross Income (AGI)</u>			
	<u>Reported on FAFSA</u>	<u>Student</u>	<u>Spouse</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.

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

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

FOR OFFICE USE ONLY:

$$\frac{\text{new AGI}}{\text{old AGI}} \times \frac{\text{old tax paid}}{\text{new tax paid}} =$$

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