



**FINANCIAL AID OFFICE**  
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## 2018-2019 Tax Assessment for the 2016 Calendar Year

Complete this document only if you filed your 2016 tax return as Married Filing Jointly and your marital status has changed. Calculate each line, using only whole dollar amounts and round by 2 decimal places. Follow the return instructions provided by the Financial Aid Office.

**STUDENT NAME:** \_\_\_\_\_ **LAST FOUR DIGITS OF SSN:** \_\_\_\_\_

### A. INCOME

1. Student or Parent Income (from W-2's or signed statement from the filer that certifies the base year wages and tips). \_\_\_\_\_
2. Taxable Interest (1040 line 8a, 1040A line 8a). If interest is from a joint account, assess at 50%. \_\_\_\_\_
3. Ordinary dividends (1040 line 9a, 1040A line 9a). If dividends are in both names assess at 50%. \_\_\_\_\_
4. Taxable refunds, credits, or offsets of state and local income taxes (1040 line 10). Assessed at 50% unless indicated by applicant. \_\_\_\_\_
5. Alimony received (1040 line 11). \_\_\_\_\_
6. Business income or loss (1040 line 12). If the business income is earned on a joint account, access at 50%. \_\_\_\_\_
7. Capital gain (1040 line 13, 1040A line 10). If capital gain is from joint investment, assess at 50%. \_\_\_\_\_
8. Other gains or losses (1040 line 14). If from joint investment, assess at 50%. \_\_\_\_\_
9. Total Taxable IRA distributions (1040 line 15b , 1040A line 11b). \_\_\_\_\_
10. Total Taxable pensions & annuities (1040 line 16b, 1040A line 12b). \_\_\_\_\_
11. Rental real estate, royalties, partnerships, S corporations, trusts, etc. (1040 line 17). If joint ownership, assess at 50%. \_\_\_\_\_
12. Farm income (or loss) (1040 line 18). Assess as 50%. \_\_\_\_\_
13. Unemployment compensation (1040 line 19, 1040A line 13). \_\_\_\_\_
14. Taxable Social Security benefits (1040 line 20b, 1040A line 14b). \_\_\_\_\_
15. Other income (1040 line 21). \_\_\_\_\_

**TOTAL INCOME:** \_\_\_\_\_

Name: \_\_\_\_\_ SSN: \_\_\_\_\_

**B. ADJUSTED TOTAL INCOME** .....

- 1. Educator Expenses (1040 line 23, 1040A line 16). \_\_\_\_\_
- 2. Business expenses of reservists, performing artists, and fee-basis government officials (1040 line 24). \_\_\_\_\_
- 3. Health savings account deduction (1040 line 25). \_\_\_\_\_
- 4. Moving expenses (1040 line 26). If applies to the couple jointly, access at 50%. \_\_\_\_\_
- 5. One-half of self-employment tax (1040 line 27). \_\_\_\_\_
- 6. Self-employed SEP, SIMPLE and qualified plans (1040 line 28). \_\_\_\_\_
- 7. Self-employed health insurance deduction (1040 line 29). \_\_\_\_\_
- 8. Penalty on early withdrawal of savings (1040 line 30).  
If joint account, assess at 50%. \_\_\_\_\_
- 9. Alimony paid (1040 line 31a). \_\_\_\_\_
- 10. IRA deduction (1040 line 32, 1040A line 17). \_\_\_\_\_
- 11. Student loan interest deduction (1040 line 33, 1040A line 18). \_\_\_\_\_
- 12. Tuition and fees deduction (1040 line 34, 1040A line 19). \_\_\_\_\_
- 13. Domestic production activities deduction (1040 line 35). \_\_\_\_\_

**TOTAL ADJUSTMENTS** \_\_\_\_\_

**C. CALCULATION** .....

- 1. TOTAL INCOME minus TOTAL ADJUSTMENTS = NEW AGI. \_\_\_\_\_
- 2. AGI from Joint Taxes (1040 line 37, 1040A line 21). \_\_\_\_\_
- 3. Taxes paid from Joint Taxes (1040 line 56, 1040A line 39). \_\_\_\_\_
- 4. Determine % of income by dividing NEW AGI (C 1) by AGI from Joint Taxes (C 2). \_\_\_\_\_
- 5. % (C 4) times the taxes paid on the Joint Taxes (C 3) = NEW TAXES. \_\_\_\_\_

**Students attending Purdue University Global online must provide their original signature using blue or black ink.**

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_