

This is a FILLABLE form. PLEASE SUBMIT to IDOC or email to [ugrad-finaid@columbia.edu](mailto:ugrad-finaid@columbia.edu)

## 2023-2024 Alternate Tax Year Worksheet

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

Parent 1 Name \_\_\_\_\_ Parent 1 Email \_\_\_\_\_

Parent 2 Name \_\_\_\_\_ Parent 2 Email \_\_\_\_\_

We are collecting this information to gain a better understanding of your family's financial circumstances. Your initial financial aid eligibility will be based on the 2021 tax year. If we decide to use estimated 2022 information, we will require copies of the parents' 2022 federal income tax returns by June 1, 2023. If we decide to use estimated 2023 information, we will require copies of the parents' 2023 federal income tax returns by March 1, 2024 so that students do not have registration problems due to an unpaid balance. If the respective finalized returns are not received by the deadlines, we will revert to the 2021 information. If actual 2022 or 2023 income is higher than projected, the financial aid award will be adjusted appropriately. We re-evaluate need-based financial aid eligibility each academic year.

INSTRUCTIONS: This is a fillable form. Please enter your actual 2021 information from your tax return, and complete the 2022 and 2023 columns with actual or estimated information. There are separate sections for taxable income; adjustments, deductions, and taxes paid; and untaxed income. Please check your numbers against current paystubs and adjust taxes paid to reflect the actual/expected increase/decrease in income. Attach documents (recent paystubs; job loss documentation; etc.) supporting your estimates.

TAXABLE INCOME	2021	2022	2023	Where to Find
	<input type="checkbox"/> Actual	<input type="checkbox"/> Actual <input type="checkbox"/> Estimate	<input type="checkbox"/> Actual <input type="checkbox"/> Estimate	IRS 1040, Schedule 1 & W2
Parent 1 Wages				W2 Box 1
Parent 2 Wages				W2 Box 1
Interest Income				1040, Line 2b
Dividend Income				1040, Line 3b
IRAs, Pensions and Annuities				1040, Line 4b + 5b
Social Security Benefits				1040, Line 6b
Tax Refunds				Schedule 1, Line 1
Alimony Received				Schedule 1, Line 2a
Schedule C Business Income(s)				Sch C(s) Line 31 (total positive income)
Schedule C Business Loss(es)				Sch C(s) Line 31 (total negative income)
Schedule D Capital Gain or (Loss)				1040, Line 7
Other Gain or (Loss)				Schedule 1, Line 4
Schedule E/F Business Income(s)				Total the positive income from the following fields: Sch E Lines 24 + 30 + 35 + (39 + 40 if positive) + Sch F Line 34
Schedule E/F Business Loss(es)				Total the negative income from the following fields: Sch E Lines 25 + 31 + 36 + (39 + 40 if negative) + Sch F Line 34 (if negative)
Unemployment Compensation				Schedule 1, Line 7
Other Income (including Foreign Earned)				Schedule 1, Line 8
Severance Pay not already included in W2				
Taxable Disability Benefits				Not included in Social Security
<b>TOTAL TAXABLE INCOME</b>				

TAX SUMMARY	2021	2022	2023	Where to Find
	<input type="checkbox"/> Actual	<input type="checkbox"/> Actual <input type="checkbox"/> Estimate	<input type="checkbox"/> Actual <input type="checkbox"/> Estimate	
Adjustments to Income				1040, Line 10
Adjusted Gross Income				1040, Line 11
Standard/Itemized Deductions				1040, Line 12c
Unreimbursed Medical and Dental Expenses				Schedule A, Line 1
State and Local Taxes				Schedule A, Line 5d
U.S. Income Tax Paid				1040, Line 22
Nondeductable Alimony Paid & Child Support Paid				

UNTAXED & PRE-TAX INCOME	2021	2022	2023	Where to Find
	<input type="checkbox"/> Actual	<input type="checkbox"/> Actual <input type="checkbox"/> Estimate	<input type="checkbox"/> Actual <input type="checkbox"/> Estimate	
Tax-Exempt Interest Income				1040, Line 2a
IRA Distributions/Pension/Annuities				1040, Line 4a -4b + 5a -5b
Social Security Benefits				1040, Line 6a - 6b
SEP/SIMPLE + IRA + HSA Deduction				Schedule 1, Line 13+16+20
Pre-Tax Retirement Contributions: 401(k), 403(b) etc.				W2 Box 12 Codes D + E + F + G + H + S
Pre-Tax Flexible Spending Accounts				W2 Box 12 Code W
Child Support Received				
Untaxed Disability Benefits				Not included in Social Security
Public Assistance				TANF, SSI, EIC, etc.
Other Untaxed Income (e.g. loans/gifts from family, etc.)				Please explain below.
<b>TOTA UNTAXED INCOME</b>				

<b>TOTAL TAXABLE AND UNTAXED INCOME</b>				
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SPECIAL CIRCUMSTANCES (Please attach an additional sheet if necessary):

CERTIFICATION: All the information on this form is true and complete to the best of my knowledge. If asked, I agree to give proof of the information that I have given on this form. I realize that this proof may include a copy of my U.S., state or local income tax returns. I certify that all information is correct at this time, and that I will send timely notice to the college of any significant change in family income or assets, financial situation, college plans of other children, or the receipt of other scholarships or grants.

SIGNATURE of PARENT \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE of PARENT \_\_\_\_\_ DATE \_\_\_\_\_

Please save a copy of the completed form for your records as it will assist you when completing the official paperwork later on.