

MOEX

Family Income and Expense Form 2016-2017

Purpose of Form

Generally, the Family Income and Expense Form is requested to provide a more detailed picture of your family's financial strength. This form collects information about income received in 2015 as well as some of the most common expenses that may have been incurred in 2015.

General Instructions

Dependent students should complete both the Parent and Student columns. Independent students should complete only the Student columns. For each field, report the appropriate values from the 2015 calendar year.

When reporting income, be sure to report all sources of income whether domestic or foreign. Independent students who are married must report their spouse's income as well in the Student column.

Dependent students must report parent'(s) expenses for 2015. Independent students must report student/spouse expenses for 2015. Carefully read each item and report monthly expenses where appropriate. Multiply all monthly expenses by 12 to calculate the annual amount. If a monthly expense did not exist for the entire 12 months of 2015, provide only the total amount of that particular expense in 2015 and **include a statement on page four explaining the situation**. For example, if car payments were made for only 6 months instead of 12 because the car was paid off after 6 months, include a statement to clarify.

If your expenses exceed your reported income, you must include a written explanation of how your family is meeting its expenses. Forms received without a written explanation in this event will be considered incomplete. If you wish to include any additional information regarding your or your family's financial circumstances, please submit it along with this form.

Student Financial Services may request third-party documentation to confirm the values you report on your Family Income and Expense Form. Should you or a parent submit a form with incorrect information, you must also submit third-party documentation to confirm the correct values. Adjustments to a financial aid award as a result of submitting documentation to correct a Family Income and Expense Form are neither guaranteed nor immediate.

Forms received without the appropriate signature(s) or with missing information or missing pages are considered incomplete and must be resubmitted. Submitting incomplete forms or documents will delay the evaluation of your financial aid eligibility and the awarding of your financial aid.

**MOEX Family Income and Expense Form
2016-2017**

Student's University ID: - or SIS ID:

Student's Full Name: _____
(LEGAL NAME - PRINT) first middle last

SECTION 1: INCOME AND SUPPORT for calendar year 2015

Report Values for Calendar Year 2015 only	Annual Amounts	
	Parent(s) (Dependent Students Only)	Student (And spouse, if independent)
Adjusted Gross Income as reported on 2015 tax return (if you will not file 2015 taxes or haven't done so yet, report total wages earned from work in 2015)		
If self-employed or a business owner, withdrawals from a business used in 2015 to meet household or personal expenses. Do not include amounts already reported above as wages.		
Payments to tax-deferred pension and retirement savings plans in 2015		
Total contributions to Flexible Spending Accounts in 2015 (for health care or dependent care)		
Social Security received in 2015 for all family members (for Parent section, exclude any portion received by the student in 2015)		
Alimony/Spousal support received in 2015 (Exclude if already reported on 2015 tax return and included in AGI above)		
Untaxed distributions in 2015 from retirement plans (Pension/IRA/401k) (Exclude taxed portion of distributions if already reported on 2015 tax return and included in AGI above)		
Child support received in 2015 for all children in the household		
On-base military housing or the value of a basic military allowance for housing (can be found on final leave and earnings statement of 2015)		
Housing, food and other living allowances paid in 2015 to members of the military, clergy and others. Don't include the value military housing or the value of a basic military allowance for housing listed above.		
Veterans non-education benefits received in 2015		
Total cash assistance given by family and friends in 2015, including those living outside the U.S.		
Total loans from family and friends received in 2015, including those living outside the U.S.		

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2016-2017

Student's University ID: - or SIS ID:

SECTION 1: INCOME AND SUPPORT (CONTINUED)

Report Values for Calendar Year 2015 only	Annual Amounts	
	Parent(s) <small>(Dependent Students Only)</small>	Student <small>(And spouse, if independent)</small>
<p>Total expenses paid on your behalf in 2015. This includes support—such as mortgage, rent, utilities, insurance, or car payments—paid by another person, such as a noncustodial parent, friend or relative. It also includes distributions to the student from a 529 plan <u>owned by someone other than the student or the student's custodial parent(s)</u>.</p> <p>Note: Do <u>not</u> include the value of your housing if you are living rent-free with others. If you are living rent-free with others, please report the value of this benefit in the table at the bottom of this page.</p>		
<p>Other income received in 2015 not otherwise reported (include worker's compensation, disability, untaxed portions of health savings accounts from IRS form 1040 line 25, Black Lung Benefits, etc.)</p> <p>List source(s): _____ _____</p>		
<p>Total Income in 2015 (Include any values on previous page)</p>	\$	\$

Please check if any family member in the household received any of these in 2015.	SNAP <input type="checkbox"/> <small>(Supplemental Nutrition Assistance Program)</small>	WIC <input type="checkbox"/> <small>(Women, Infants and Children supplemental program)</small>	TANF <input type="checkbox"/> <small>(Temporary Assistance for Needy Families)</small>	SSI <input type="checkbox"/> <small>(Supplemental Security Income)</small>	Free <input type="checkbox"/> or reduced price lunch
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Does your family own a home, pay rent, or live rent-free with others?	Own home <input type="checkbox"/>	Rent <input type="checkbox"/>	Live rent-free with others <input type="checkbox"/>
If you live rent-free with others, provide the approximate monthly value of the housing. Living rent-free means that the occupant does not have an obligation to pay the homeowner(s). However, here you should indicate the amount that a third party might pay if they were occupying and paying for the same space.			\$ _____ /month <small>(Do not include any values already reported above)</small>

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Student's University ID: - or SIS ID:

SECTION 2: EXPENSES

Report Values for Calendar Year 2015 only	Expenses (Dependent Students report parent expenses; Independent Students report student/spouse expenses)	
	Monthly	Annual Total
Primary housing (mortgage, rent or monetary value of housing if living rent-free with others)	X12	
Primary housing real estate and/or property tax paid in 2015 (Do not report if already included in mortgage payments)	X12	
Homeowner's/Renter's Insurance paid in 2015 (Do not report if already included in mortgage payments)	X12	
Combined utilities paid (electric, gas, internet/cable, phones, water)	X12	
Cell phone bill payments	X12	
Combined car payments for all vehicles	X12	
Auto insurance for all vehicles paid in 2015	X12	
Insurance payments (health insurance, life insurance, etc. withheld from paycheck only)	X12	
Transportation costs (bus/train fares, fuel expenses, car maintenance, etc.)	X12	
Food and grocery expenses	X12	
Child/dependent care expenses	X12	
Medical expenses paid out of pocket (medication, dentist or doctor visit, etc.)	X12	
Household/personal expenses	X12	
Education expenses paid out of pocket	X12	
Entertainment/leisure/membership expenses (Dining out, gym membership, etc.)	X12	
Consumer debt payments (home equity, credit card, other loans)	X12	
Other monthly expenses not listed above: _____	X12	
Total Expenses in 2015		

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Student's University ID: - or SIS ID:

<p>Do your monthly expenses exceed your monthly income? If YES, please attach a signed statement with any relevant details, including how you are able to meet your expenses. If you are using a loan or credit card(s) to meet your expenses, you must also submit the loan promissory note or credit card statement(s) to verify this.</p>	<input type="checkbox"/> Yes Attach statement (required)	<input type="checkbox"/> No
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If you are required to, or would like to, provide any additional information concerning your family's income and/or expenses, please do so below. Attach additional pages if necessary.

CERTIFICATION STATEMENT: I certify that all the information reported to qualify for federal aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner. I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail, or both and my financial aid may be terminated. The student and one parent whose information was reported on the FAFSA must sign and date this form.

STUDENT SIGNATURE _____ Date _____

PARENT SIGNATURE _____ Date _____
(Dependent students only)