

AWARD YEAR 2008-2009

DATE _____

STUDENT _____

SS# _____

Dear Financial Aid Applicant:

Your federal financial aid data has been received by this office, however we need additional information in order to continue processing your aid. Our records show that either you, your spouse, or a parent is a member of the clergy. Federal financial aid program eligibility is based on all types of income and benefits, including housing allowances and other non-taxable benefits provided to some members of the clergy. The form below should be completed, signed by you (and your parent if you are a dependent student), and returned to the Office of Student Financial Planning of Union University, 1050 Union University Drive, Jackson, TN 38305.

STATEMENT OF INCOME AND BENEFITS FOR CLERGY

Please answer all questions for calendar/tax year 2007. Enter N/A if not applicable.

Adjusted Gross Income from 2007 Tax Return (1040 line 37, 1040A line 21) \$ _____

Housing Allowance - Do not list any amount already included in the AGI. Do include the amount of Housing Allowance listed in Schedule SE. \$ _____

Utilities Allowance -Do not list any amount already included in the AGI. Do include the amount of Utilities Allowance listed in Schedule SE. \$ _____

Parsonage Rental Value - Fair market value of parsonage if no actual allowance is given, but a home is provided. \$ _____

Any other non-taxable benefits accepted as a benefit of employment \$ _____

Form 2555 Exclusion \$ _____

TOTAL INCOME AND BENEFITS \$ _____

Student signature _____

Date _____

Parent signature _____

Date _____