



State Grant and Special Programs
Phone: 1-800-692-7392 Fax: 717-720-3786
P.O. Box 8157 Harrisburg, PA 17105-8157

RECENT SEPARATION/DIVORCE FORM
(INDEPENDENT STUDENT)

(NOTE: Deadline for returning this form and 2010 tax documents to PHEAA is April 1, 2012.)

Student's Account Number grid

Student's Account Number

OR

Student's Social Security Number grid

Student's Social Security Number

2011-12

Print Student's Name

It is the policy of this Agency to consider an application based on the student's income only when the student and spouse have been separated for at least two full months. In order for PHEAA to properly determine your 2011-12 Pennsylvania State Grant eligibility, complete the following, sign, and return this form and the requested tax documents to PHEAA, P.O. Box 8157, Harrisburg, PA 17105-8157 within 30 days, once the two-month condition is met. Do not leave any questions blank. If none, enter zeros. No data will be accepted after April 1, 2012.

- 1. The date of your separation. (month/day/year)
The date of your divorce. (month/day/year)
2. Your current physical address (no P.O. Boxes) and phone number.
3. Provide a complete copy of your 2010 U.S. Income Tax Return including all supporting forms, schedules and W-2 Forms, if such has not previously been submitted.
4. Indicate the amount of your ADJUSTED GROSS INCOME (OR YOUR PORTION IF YOU FILED JOINTLY WITH A SPOUSE) as shown on your 2010 U.S. Income Tax Return (Form 1040 - line 37; Form 1040A - line 21; Form 1040EZ - line 4; or Form 1040X - line 1).
5. 2010 payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S.
6. 2010 IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-line 28 + line 32 or 1040A-line 17.
7. Child support received for all children in 2010. Do not include foster or adoption payments.
8. 2010 tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.
9. 2010 untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.
10. 2010 untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.
11. Housing, food and other living allowances paid to members of the military (excluding on-base housing or housing allowances), clergy and others (including cash payments and cash value of benefits) which were received in 2010.
12. 2010 Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.



- 13. Other untaxed income not reported, such as workers' compensation, disability, etc. Do NOT include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. \$ _____
- 14. Money received, or paid on your behalf (e.g., bills, living/college expenses, etc.) in 2010, not reported elsewhere on this form. \$ _____
- 15. Indicate your spouse's current physical address (no P.O. Boxes).

Indicate your anticipated 2011 income and family information in the following questions:

- 16. Enter the total yearly amount of gross taxed income (wages, salaries, tips, severance pay, taxable portions of pensions and annuities, taxable portions of Social Security benefits, alimony which will be received, unemployment compensation, interest and dividend income, business or farm income, capital gains, income from rents received after expenses for mortgage interest, taxes, and insurance, and all other taxed income [prior to deductions, adjustments, or exemptions]) you expect to receive from January 1, 2011 until December 31, 2011. Do not provide weekly or monthly amounts, only yearly totals. IF NONE, ENTER ZEROS. \$ _____
- 17. Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) which have been and/or will be made during 2011, including, but not limited to, amounts which would be reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S. \$ _____
- 18. 2011 IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans. \$ _____
- 19. Child support which has been and/or will be received for all children in 2011. \$ _____
- 20. 2011 tax exempt interest income. \$ _____
- 21. 2011 untaxed portions of IRA distributions. \$ _____
- 22. 2011 untaxed portions of pensions. \$ _____
- 23. 2011 housing, food and other living allowances paid to members of the military (excluding on-base housing or housing allowances), clergy and others (including cash payments and cash value of benefits). \$ _____
- 24. 2011 Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. \$ _____
- 25. Other 2011 untaxed income not reported elsewhere on this form, such as workers' compensation, disability, etc. \$ _____
- 26. Money which has been and/or will be received, or paid on your family's behalf (e.g., bills, living/college expenses, etc.) in 2011, not reported elsewhere on this form. \$ _____
- 27. Write in the number of people that you will support between July 1, 2011 and June 30, 2012. Include yourself and your children if they get more than half of their support from you or if they would be required to provide your information when applying for Title IV Federal Student Aid. Include other people only if they meet the following criteria: they now live with you and they receive more than half of their support from you and they will continue to be provided with more than half of their support from July 1, 2011 through June 30, 2012. (Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, payment of college costs, etc.) _____
- 28. Write in the number of people from question 27, including yourself, who will be a college student between July 1, 2011 and June 30, 2012. Include only students enrolled at least half-time (defined as at least 6 semester credit hours, 12 clock hours per week, etc.) in 2011-12. The student must be enrolled in a program that leads to a college degree or certificate. If another household member is enrolled but does not have a 2011-12 State Grant application on file, please provide verification of this student's enrollment. _____

THE PENALTY FOR SUBMISSION OF FRAUDULENT INFORMATION ON THIS FORM MAY BE REPAYMENT OF TRIPLE ANY AMOUNT OF MONEY RECEIVED PLUS A FINE AND/OR IMPRISONMENT.

Signature of Student Date

