



Saint Joseph's College

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2011 NON-TAX FILER INCOME AND BENEFITS STATEMENT

Name of Student _____ **SS#** _____

Each student, spouse, or parent who will not and is not required to file a federal tax return for 2011 must complete this form. Federal filing requirements are described on the reverse side. You must attach copies of W2s, 1099s, or other supporting documentation. This form may be copied for multiple family members.

Name of Non-Tax filer: _____

Relationship to Student: _____

SOURCE OF INCOME	Amount received in 2011 (Complete all lines. Write in "0" as necessary.)
Wages (list all employers): 1	\$
Wages: 2	\$
Wages: 3	\$
Welfare benefits , including TANF, AFDC and ADC.	\$
Social security benefits (including those received for your dependents).	\$
Veterans' benefits, such as Death Pension or Dependency & Indemnity Compensation (DIC).	\$
Worker's compensation.	\$
SSI/Disability benefits (including those received for your dependents).	\$
Child support.	\$
Other , please describe.	\$
TOTAL	\$

I have reported to the best of my ability all untaxed income for 2011 and have attached documentation.

NON-TAX FILER'S SIGNATURE: _____ **DATE:** _____

Please see other side

DEPENDENT STUDENTS:

Per IRS requirements, you must file federal taxes if any of the following apply:	
You are unmarried, and:	You are married, and:
Your earned income is more than \$5,800	Your earned income is more than \$5,800
Your unearned income is more than \$950	Your unearned income is more than \$950
	Your gross income was at least \$5 and your spouse files a separate return and itemized deductions.
Your gross income is more than the larger of: <ul style="list-style-type: none"> • \$950, or • Your earned income (up to \$5,500) plus \$300 	Your gross income is more than the larger of: <ul style="list-style-type: none"> • \$950, or • Your earned income (up to \$5,500) plus \$300

INDEPENDENT STUDENTS:

Per IRS requirements, you must file federal taxes if:	
Your filing status would be:	And your gross income was:
Single	\$ 9,500 or more
Married, filing jointly	\$19,000 or more

Occasionally, individuals have one-time or infrequent financial transactions that may require them to file a Federal Income Tax return. If any of the following examples apply to you, then you may need to file taxes. Please go to <http://www.irs.gov> for more information.

- Did you have Federal taxes withheld from your pension and wages for this tax year and wish to get a refund back?
- Are you entitled to the Earned Income Tax Credit or did you receive Advance Earned Income Credit for this tax year?
- Were you self-employed with earnings of more than \$400.00?
- Did you sell your home?
- Will you owe any special tax on a qualified retirement plan (including an individual retirement account (IRA) or medical savings account (MSA) ? You may owe tax if you:
 - Received an early distribution from a qualified plan
 - Made excess contributions to your IRA or MSA
 - Were born before July 1, 1933, and you did not take the minimum required distribution from your qualified retirement plan.
 - Received a distribution in the excess of \$160,000 from a qualified retirement plan.
- Will you owe Social Security and Medicare tax on tips you did not report to your employer?
- Will you owe uncollected Social Security and Medicare or Railroad retirement (RRTA) tax on tips you reported to your employer?
- Will you be subject to Alternative Minimum Tax (AMT) ? (The tax law gives special treatment to some kinds of income and allows special deductions and credit for some kinds of expenses.)
- Will you owe recapture tax ?
- Are you a church employee with income in wages of \$108.28 or more from a church or qualified church-controlled organization that is exempt from employer Social Security or Medicare taxes?