

FAFSA: Finding Tax Information Worksheet

Ready to complete the FAFSA? Do you know where to find the necessary financial information that's needed?
Use this helpful table to locate tax and income information before completing the FAFSA.

| Step 1 Tax Information Requested on the FAFSA → | | Step 2 Where To Find Tax Information to Complete FAFSA → | | | Step 3 What You Find |
|--|--|---|-----------------------------|---|-------------------------|
| Line Items Student / Parent | Field Description | IRS Form 1040 | IRS Form 1040A | IRS Form 1040EZ | Enter Your Amounts |
| 35 / 79 | Adjusted Gross Income (AGI) | 37 | 21 | 4 | |
| 36 / 80 | Income Tax Paid | 57 | 35 | 10 | |
| 37 / 81 | Number of Exemptions | 6d | 6d | Line 5 = Yes , view line F No , enter 01 for single, 02 for married | |
| 38 & 39 / 82 & 83 | Wages, Salaries, Tips, etc. | 7 + 12 + 18 | 7 | 1 | |
| Worksheet A, item 1 | Earned Income Credit | 66a | 40a | 8a | |
| Worksheet A, item 2 | Additional Child Tax Credit | 68 | 41 | N/A | |
| Worksheet B, item 1 | Tax-Deferred Pension and Savings Plans | Use W-2, boxes 12a through 12d, codes D, E, F, G, H, and S | | | |
| Worksheet B, item 2 | IRA Deductions and Payments to SEP, SIMPLE, and Keogh, and other Qualified Plans | 28 + 32 | 17 | N/A | |
| Worksheet B, item 4 | Tax Exempt Interest | 8b | 8b | N/A | |
| Worksheet B, item 5 | Foreign Income | IRS Form 2555, line 45 | IRS Form 2555EZ, line 18 | N/A | |
| Worksheet B, item 6 | Untaxed Portions of IRA Distributions (Exclude Rollovers) | 15a – 15b | 11a – 11b | N/A | |
| Worksheet B, item 7 | Untaxed Portions of Pensions (Exclude Rollovers) | 16a – 16b | 12a – 12b | N/A | |
| Worksheet B, item 8 | Credit for Federal Tax on Special Fuels (nonfarmers only). | IRS Form 4136, line 17 | IRS Form 4136, line 17 | N/A | |
| Worksheet C, item 1 | Education Credits (Hope and Lifetime Learning Tax Credits) | 49 | 31 | N/A | |