



# Pepperdine University, Seaver College

## Office of Financial Assistance

### 2018-2019 Student Income Tax Non-Filer Form

Student Name: \_\_\_\_\_ CWID#: \_\_\_\_\_  
Last First M.I.

Source of Income	Student Income 2016	Partner/Spouse Income 2016 (if applicable)
<i>Ben and Jerry's (example)</i>	<i>\$1,000.00</i>	

- Include wages, salaries, tips, undocumented income and business income if self-employed.
- Please attach a copy of all 2016 W-2 forms from companies listed above.
- If you had no income in 2016, please report "\$0."
- Single dependent students that can be claimed by parents or another person must file taxes for earned income above \$6,300

I (we) certify that no income tax return has been filed and is not required to be filed for the 2016 calendar year and that all 2016 sources of income have been reported on this form.

#### Certification and Signature

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Dependent Students Only)

\_\_\_\_\_  
Date

Return to:  
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 24255 Pacific Coast Highway • Malibu • California • 90263-4301 • Phone (310) 506-4301 • Fax (310) 506-4746

**Instruction Sheet for Student Income Tax Non-Filer Form**

Do not return this page. It is for reference only.

If you and/or your spouse reported earnings on your FAFSA, but did not/will not file an income tax return for 2016, then you must complete a non-filer form.

- Please attach a copy of all 2016 W-2 forms.
- Include wages, salaries, tips, undocumented income, and business income if self-employed.
- If you had no income in 2016, please report “\$0.”
- Single dependent students that can be claimed by parents or another person must file taxes for earned income above \$6,300

**Table 1-1. 2016 Filing Requirements for Most Taxpayers**

<b>IF your filing status is...</b>	<b>AND at the end of 2016 you were...*</b>	<b>THEN file a return if your gross income was at least...**</b>
single	under 65	\$10,350
	65 or older	\$11,900
married filing jointly***	under 65 (both spouses)	\$20,700
	65 or older (one spouse)	\$21,950
	65 or older (both spouses)	\$23,200
married filing separately	any age	\$ 4,050
head of household	under 65	\$13,350
	65 or older	\$14,900
qualifying widow(er) with dependent child	under 65	\$16,650
	65 or older	\$17,900

\* If you were born on January 1, 1952, you are considered to be age 65 at the end of 2016. (If your spouse died in 2016 or if you are preparing a return for someone who died in 2016, see Pub. 501.)

\*\* Gross income means all income you received in the form of money, goods, property, and services that isn't exempt from tax, including any income from sources outside the United States or from the sale of your main home (even if you can exclude part or all of it). Don't include any social security benefits unless (a) you are married filing a separate return and you lived with your spouse at any time during 2016 or (b) one-half of your social security benefits plus your other gross income and any tax-exempt interest is more than \$25,000 (\$32,000 if married filing jointly). If (a) or (b) applies, see the instructions for Form 1040 or 1040A or Pub. 915 to figure the taxable part of social security benefits you must include in gross income. Gross income includes gains, but not losses, reported on Form 8949 or Schedule D. Gross income from a business means, for example, the amount on Schedule C, line 7, or Schedule F, line 9. But, in figuring gross income, don't reduce your income by any losses, including any loss on Schedule C, line 7, or Schedule F, line 9.

\*\*\* If you didn't live with your spouse at the end of 2016 (or on the date your spouse died) and your gross income was at least \$4,050, you must file a return regardless of your age.

**Dependents: Please see chart on the following page**

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## Chart B – For Children and Other Dependents

If your parent (or someone else) *can* claim you as a dependent, use this chart to see if you must file a return.

In this chart, **unearned income** includes taxable interest, ordinary dividends, and capital gain distributions. It also includes unemployment compensation, taxable social security benefits, pensions, annuities, and distributions of unearned income from a trust. **Earned income** includes salaries, wages, tips, professional fees, and taxable scholarship and fellowship grants. **Gross income** is the total of your unearned and earned income.

Single Dependents	
Either 65 or over <b>or</b> blind	You must file a return if any of the following apply. 1. Your unearned income was over \$2,600 (\$4,150 if 65 or older <b>and</b> blind). 2. Your earned income was over \$7,850 (\$9,400 if 65 or older <b>and</b> blind). 3. Your gross income was more than the larger of — a. \$2,600 (\$4,150 if 65 or older <b>and</b> blind) or b. Your earned income (up to \$5,950) plus \$1,900 (\$3,450 if 65 or older <b>and</b> blind).
Under 65 and not blind	You must file a return if <b>any</b> of the following apply. 1. Your unearned income was over \$1,050. 2. Your earned income was over \$6,300. 3. Your gross income was more than the larger of — a. \$1,050, or b. Your earned income (up to \$5,950) plus \$350.
Married Dependents	
Either age 65 or older <b>or</b> blind	You must file a return if <b>any</b> of the following apply. 1. Your unearned income was over \$2,300 (\$3,550 if 65 or older <b>and</b> blind). 2. Your earned income was over \$7,550 (\$8,800 if 65 or older <b>and</b> blind). 3. Your gross income was at least \$5 and your spouse files a separate return and itemizes deductions. 4. Your gross income was more than the <b>larger</b> of — a. \$2,300 (\$3,550 if 65 or older <b>and</b> blind), or b. Your earned income (up to \$5,950) plus \$1,600 (\$2,850 if 65 or older <b>and</b> blind).
Under age 65 and not blind	You must file a return if any of the following apply. 1. Your unearned income was over \$1,050. 2. Your earned income was over \$6,300. 3. Your gross income was at least \$5 and your spouse files a separate return and itemizes deductions. 4. Your gross income was more than the larger of — a. \$1,050, or b. Your earned income (up to \$5,950) plus \$350.

### Tax for Certain Children who have Unearned Income (Kiddie Tax)

For children under age 18 and certain older children, unearned income over \$2,100 is taxed at the parent's rate if the parent's rate is higher than the child's. For this purpose, "unearned income" includes all taxable income other than earned income, such as taxable interest, ordinary dividends, capital gains, rents, royalties, etc. It also includes taxable social security benefits, pension and annuity income, taxable scholarship and fellowship grants not reported on Form W-2, unemployment compensation, alimony, and income received as the beneficiary of a trust. If the child's unearned income is more than \$2,100, Form 8615 must be used to figure the child's tax. **Form 8615 is out of scope.**

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