

**FRANCIS MARION UNIVERSITY
OFFICE OF FINANCIAL ASSISTANCE**

STUDENT'S NAME _____ FMU ID: _____

Important: ALL information below this line is to be completed by the individual seeking an income adjustment for the 2023-2024 academic year. Give your best estimate of what you will file on your 2023 Income Tax Return.

NAME _____ RELATIONSHIP TO STUDENT _____

REASON FOR REQUEST (Check All That Apply & Complete All Blanks)

_____ Loss of Employment - Date You Lost Employment _____

_____ Reduced work hours - Date Hours Were Reduced _____

My hours were reduced from _____ to _____ per week.

My pay is _____ per hour/week/month **Circle one****

_____ Change of employment (less pay) - Date Employment Was Changed _____

I work _____ hours per week.

My pay was reduced from _____ to _____ per hour/week/month **Circle one****

_____ Other (Explain): _____

ANTICIPATED INCOME STATEMENT

EXPECTED TAXABLE INCOME FOR 2023 (IF NONE, THEN LEAVE BLANK)

EARNINGS FROM WORK	\$
INTEREST FROM ACCOUNTS, INVESTMENTS, ETC.	
DIVIDENDS	
BUSINESS INCOME	
IRA DISTRIBUTIONS	
TAXABLE PORTIONS OF UNEMPLOYMENT COMPENSATION	
TAXABLE PORTIONS OF SOCIAL SECURITY, SSI, DISABILITY BENEFITS	
SEVERANCE PAY	
OTHER TAXABLE INCOME (EXPLAIN):	
TOTAL EXPECTED TAXABLE INCOME FOR 2023	\$

EXPECTED NON-TAXABLE INCOME FOR 2023

CHILD SUPPORT RECEIVED	
WELFARE BENEFITS (INCLUDING TANF)	
NON-TAXABLE PORTIONS OF UNEMPLOYMENT COMPENSATION	
NON-TAXABLE PORTIONS OF RAILROAD RETIREMENT	
VETERANS BENEFITS (EXCLUDE EDUCATIONAL BENEFITS). INCLUDE DEATH PENSION AND DEPENDENCY AND INDEMNITY COMPENSATION	
JTPA NON-EDUCATIONAL BENEFITS	
FOOD, HOUSING, AND OTHER LIVING ALLOWANCES FOR MILITARY AND CLERGY	
PAYMENTS TO TAX-DEFERRED PENSION AND SAVINGS PLANS (PAID DIRECTLY OR WITHHELD FROM EARNINGS). INCLUDE ONLY UNTAXED PORTION OF 401K AND 403B	
WORKMAN'S COMPENSATION	
OTHER UNTAXED INCOME (EXPLAIN):	
TOTAL EXPECTED NON-TAXABLE INCOME FOR 2023	\$

The information given above reflects my expected income for 2023 to the best of my knowledge.

Signature Date

Required Documentation Examples:

- Unemployment Statements
- 2023 Earning statements (if change occurred in 2023)
- 2022 Federal Income Tax Return and W-2's (if change occurred in 2022)

Return documentation and completed form to: Francis Marion University
Office of Financial Assistance
PO Box 100547
Florence, SC 29502-0547
(843) 661-1190 (office) (843) 661-1195 (fax)