

## MOEX

**Family Income and Expense Form  
2023-2024**Purpose of Form

Generally, the Family Income and Expense Form is requested to provide a more detailed picture of your family's financial strength. This form collects information about income received in 2021 as well as some of the most common expenses that may have been incurred in 2021.

General Instructions

When reporting income, be sure to report all sources of income, whether domestic or foreign, for both you and your parent(s).

Students must report parent'(s) expenses for 2021. Carefully read each item and report monthly expenses where appropriate. Multiply all monthly expenses by 12 to calculate the annual amount. If a monthly expense was not incurred for all 12 months of 2021, provide only the total amount for that particular expense in 2021 and **provide a statement explaining the situation**. For example, if car payments were made for only 6 months instead of 12 because the car was paid off after 6 months, provide a statement to clarify.

**If your 2021 expenses exceeded your 2021 reported income, you must provide a written explanation of how you and/or your family were meeting expenses.** Forms showing greater total expense than income and received without a written explanation will be considered incomplete. If you wish to provide any additional information regarding your or your family's financial circumstances, please submit it along with this form.

Student Financial Services may request third-party documentation to confirm the values you report on your Family Income and Expense Form. Should you or a parent submit a form with incorrect information, you must also submit third-party documentation to confirm the correct values. Adjustments to a financial aid award as a result of submitting documentation to correct a Family Income and Expense Form are neither guaranteed nor immediate.

Forms received without the appropriate signature(s) or with missing information/pages are considered incomplete and must be resubmitted. **Do not leave any questions blank**. Submitting incomplete forms or documents will delay the evaluation of your financial aid eligibility and the awarding of your financial aid.



**MOEX Family Income and Expense Form  
 2023-2024**

Student's University ID:     -      or SIS ID:

Student's Full Name: \_\_\_\_\_  
 (LEGAL NAME - PRINT) first middle last

**SECTION1: INCOME AND SUPPORT for calendar year 2021**

Report Values for Calendar Year 2021 only (enter "0" or "N/A", if appropriate)	Annual Amounts (please leave no blanks)	
	Parent(s)	Student
Adjusted Gross Income as reported on 2021 tax return (if you will not file 2021 taxes or haven't done so yet, report total wages earned from work in 2021)		
If self-employed or a business owner, indicate withdrawals from a business used in 2021 to meet household or personal expenses. (do not include amounts already reported above, in Adjusted Gross Income)		
Payments to tax-deferred pension and retirement savings plans in 2021		
Total contributions to Flexible Spending Accounts in 2021		
Alimony support received in 2021 (exclude if already reported on 2019 tax return and included in AGI noted above)		
Spousal support received in 2021 (exclude child support reported above and alimony reported on this form <u>or</u> included in AGI above; include support such as mortgage, rent, auto, utilities, insurance, education, etc. paid on behalf of your custodial parent or parents)		
Untaxed distributions from retirement plans received in 2021 – e.g., Pension/IRA/401k (exclude <u>taxed</u> portion of distributions if already reported on 2021 tax return and included in AGI above)		
Child support received annually in 2021 for <u>all</u> children in the household		
Did any family member in the household <i>other than you (the student)</i> receive <b>Social Security benefits including Social Security retirement and/or SSDI?</b> Submit copies of all <b>2021 SSA-1099s</b> for each person in the household who received this type of income/benefit, and list <i>the total amount of all benefits</i> (except the student's) in the column at right; then <b>list recipient(s) &amp; relationship(s) to student:</b> _____ _____		
On-base military housing or the value of a basic military allowance for housing (submit copy of final Leave and Earnings (LES) statement of 2021)		
Housing, food and other living allowances paid in 2021 by your or your parent(s)'s employer (exclude the value of on-base military housing or of a basic military allowance for housing listed above)		
Value of employer-provided housing (vs. housing allowance noted above)		

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## Family Income and Expense Form 2023-2024

Student's University ID:     -      or SIS ID:        
**SECTION 1: INCOME AND SUPPORT for calendar year 2021 (CONTINUED)**

<b>Report Values for Calendar Year 2021 only</b> <small>(enter "0" or "N/A", if appropriate)</small>	<b>Annual Amounts (please leave no blanks)</b>	
	Parent(s)	Student
Veterans non-education benefits received in 2021 (e.g., Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances)		
Total <i>loans</i> received in 2021 from family and friends, including those living outside the U.S.		
Total <i>cash assistance</i> (excluding any loans noted above) received in 2021 from family and friends, including those living outside the U.S.		
Merit- or need-based financial aid received in 2021		
Veterans educational benefits received in 2021		
Expenses paid in 2021 <i>by someone else, on your behalf</i> , including those related to mortgage, rent, automobile, utilities, education, or insurance. These would be expenses <i>paid by another person, such as a noncustodial parent, friend or relative</i> . (do not include any alimony or spousal support already reported on previous page)  Include any distributions to the student from an educational savings plan, such as a 529 plan, if it is <u>owned by someone other than the student or the student's custodial parent(s) or spouse</u> .  Note: If you are living rent-free with others, do not include the value of your housing here. Instead, report the value of this benefit in the appropriate table on page 4.		
Other income received in 2021 not otherwise reported (e.g., worker's compensation, disability, untaxed portions of health savings accounts from Schedule 1 Line 12 of the 2021 IRS Form 1040, Black Lung Benefits, etc.) <b>List source(s):</b> _____ _____		
<b>Total Income in 2021 (MUST include values from previous page)</b>	\$	\$

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## Family Income and Expense Form 2023-2024

 Student's University ID:     -      or SIS ID:       
**SECTION 1: INCOME AND SUPPORT for calendar year 2021 (CONTINUED)**

Please indicate with a check mark below if any family member in the household received any of these benefits in 2021.		Report total annual amount received by your family in 2021 from each source
<b>SNAP</b> (Supplemental Nutrition Assistance Program)	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
<b>WIC</b> (Women, Infants and Children supplemental program)	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
<b>TANF</b> (Temporary Assistance for Needy Families)	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
<b>Medicaid/SSI</b> (Supplemental Security Income)	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
<b>Free or reduced-price lunch</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
<b>Other benefit</b> (such as subsidized housing) List source(s): _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$

Did you or your family own a home, pay rent, or live rent-free with others in 2021? Please check appropriate box, at right.	<b>Own home</b>	<input type="checkbox"/>	<b>Pay Rent</b>	<input type="checkbox"/>	<b>Live rent-free with others*</b>	<input type="checkbox"/>
*With whom did you or your family live rent-free? _____						

**If there are any special circumstances regarding your sources of income and support, please note them here:**

**(Expenses noted on next page)**



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Student's University ID: [ ] [ ] [ ] [ ] - [ ] [ ] [ ] [ ] [ ] or SIS ID: [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

SECTION 2: EXPENSES for calendar year 2021

Table with 3 columns: Report Values for Calendar Year 2021 only, Monthly, Annual Total. Rows include: Primary housing, Primary housing real estate and/or property tax paid in 2021, Homeowner's/Renter's Insurance paid in 2021, Combined utilities paid, Cell phone bill payments, Combined car payments for all vehicles, Auto insurance paid in 2021 for all vehicles, Other insurance payments not noted above, Transportation costs, Food and grocery expenses, Medical expenses paid out of pocket, Child/dependent care expenses, Household/personal expenses, Entertainment/leisure/membership expenses, Consumer debt payments, Education expenses paid out of pocket, Other monthly expenses not listed above, Total Expenses in 2021.

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 Student's University ID:     -      or SIS ID:        

<p><b><i>Did your parent's 2021 expenses exceed 2021 income?</i></b> If YES, please attach a signed statement with any relevant details, including how you and your parents were able to meet your 2021 expenses. In addition to explaining how you or your parents were meeting 2021 expenses, you may provide any additional information concerning your family's income and/or expenses that you wish to share with us. If you or your parents used a loan or credit card(s) to meet your expenses, you must also submit a copy of the loan promissory note or credit card statement(s) to verify this.</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<p style="text-align: center;"><b>Statement is REQUIRED. Please attach signed statement to this form.</b></p>		

**If there are any special circumstances regarding your expenses, please note them here:**

**CERTIFICATION STATEMENT:** I certify that all the information reported to qualify for federal aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner. I understand that if I purposely give false or misleading information, I may face legal consequences and my financial aid may be terminated. The student and one parent whose information was reported on the FAFSA must sign and date this form.

STUDENT SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_

PARENT SIGNATURE \_\_\_\_\_ Date \_\_\_\_\_