2014-2015 Taxable Tuition Benefit Worksheet

Student Name: __________________________ Loyola ID: ______________________________
(Please print) (Your 11-digit Loyola ID number begins 0000.)

As a recipient of taxable tuition benefits for dependents of Loyola University Medical Center employees, students are requested to provide a copy of the Loyola employee’s 2013 federal tax transcript and W-2 forms. The amount of the taxable tuition benefit is reported as an inflated income for the Loyola University Medical Center employee, possibly precluding the student from receiving aid from other financial aid programs.

The Financial Aid Office’s review of the tax information will ensure that the student is receiving an accurate financial aid award, including tuition benefits. The Office of Student Financial Assistance will remove the amount of taxable tuition benefit reported on the employee’s W-2 Form so that the employee’s actual income from work is used to determine financial aid eligibility.

Attach a copy of the Loyola employee’s signed 2013 federal tax transcript with all schedules and W-2 Forms attached, and sign the bottom of this form.

Taxes missing signatures, schedules or W-2 Forms will be returned.

To get a copy of the 2013 federal tax transcript, you can request a copy from the Internal Revenue Service by calling: 1.800.829.1040.

Certification Statement:
All of the information provided by me or any other person on this form is accurate and complete to the best of my knowledge. If requested, we agree to give proof of the information we have provided on this form. Failure to provide the requested information will result in the loss of financial aid eligibility.

_________________________________________  ______________________
Student’s Signature                          Date

_________________________________________  ______________________
Mother/Stepmother’s Signature                Date

_________________________________________  ______________________
Father/Stepfather’s Signature                Date