

Orange Coast College Financial Aid Office
2008 Federal Tax Return: 1040 Required for Filing

For the purposes of determining eligibility for the Simple Need Analysis, was the tax filer REQUIRED to file a 1040 instead of a 1040A or 1040EZ?

YES, IF Line 43, Taxable Income is GREATER THAN \$100,000* OR

<u>YES IF amounts other than zero appear on the following lines: Section</u>	<u>Line #</u>	<u>Description</u>
Income	10	Taxable refunds/credits of local/state taxes
11		Alimony received
12		Business Income or Loss
13		Capital Gain or Loss (ignore if Schd D was not required)
14		Other Gains or Losses (Form 4797)
17		Rental Real Estate/Royalties/Partnerships/S Corp (Schd E)
18		Farm Income
21		Other Income
Adjustments	24	Certain Business Expenses: reservists, artists & govt officials
25		Health Savings Account deduction
26		Moving Expenses
27		Half of Self-Employment Tax
28		Self-Employed Health Insurance deduction
29		Self-Employed SEP, SIMPLE & Qualified Plans
30		Penalty on Early Withdrawal of Savings
31a		Alimony paid
35		Domestic Production Activities
Taxes &	40	If Itemized Deductions from Schedule A were used
Credits	43 44	If Taxable Income is more than \$100,000* If Form 8814, or Form 4972 is checked
47		Foreign Tax Credit
53		Credits from Form 8396 or 8839 or 5695
54		Other Tax Credits from Form 3800, 8801 or other
Other Taxes	57	Self-Employment Tax
58		Soc. Sec./Medicare Tax from Form 4137 or 8817

59	Tax on Qualified Plans, including IRAs	
60	Additional Taxes on AEIC payments or Household Employment tax	
Payments	65	Excess social security and RRTA tax withheld
67	Amount Paid with Request for Extension to File	
68	Other credits from Forms 2439 or 4136 or 8801 or 8885	
69	First-time Home Buyer Credit	