

# QUICK REFERENCE CHART

## 2016-17 Parents' Financial Statement and 2015 Tax Documents

Use this table to identify which questions on the Parents' Financial Statement (PFS) can be answered using information from your IRS tax forms, such as your W2, 1040, and certain schedules.

ITEM	2016-17 PFS ITEM	2015 TAX FORM
Alimony paid	PFS 7J	1040 Line 31a
Alimony received	PFS 7E	1040 Line 11
Business profit/loss— Sole Proprietorships	PFS 19	1040 Line 12 / Sch C
Capital gains/losses	PFS 7M	1040 Line 13/ Sch D / Form 8949
Child care expenses	PFS 13B	1040 Line 49 / Form 2441
Children in home	PFS 2, 3	1040 Line 6c
Earned income credit	PFS 8I	1040 Line 66a / Sch EIC
Exemptions claimed	PFS 6C	1040 Line 6d
Farm profit/loss	PFS 19	1040 Line 18 / Sch F
Federal income taxes due	PFS 6F	1040 Line 63 minus Line 57
Foreign income	PFS 7T, 8L	1040 Line 21 / Form 2555
IRA income—taxable	PFS 7O	1040 Line 15b
IRA income—nontaxable	PFS 8M	1040 Line 15a minus 15b
Interest, dividend income—taxable	PFS 7C, 7D	1040 Line 8a, 9a / Sch B
Interest—nontaxable	PFS 8K	1040 Line 8b
Itemized deductions	PFS 6E	1040 Line 40 / Sch A
Medical, dental expenses	PFS 14A	Schedule A, Line 1
Partnership profit/loss	PFS 7Q	1040 Line 17 / Sch E Line 32 Form 1065 and K-1
Pension income—taxable	PFS 7P	1040 Line 16b / 1099 R Box 2a
Pension income—nontaxable	PFS 8M	1040 Line 16a minus 16b / 1099 R Box 1 minus Box 2a
Rental real estate income	PFS 7Q	1040 Line 17 / Sch E, Line 26
Salary and wages	PFS 7A, 7B	1040 Line 7 / W-2 Box 1
S-Corporation profit/loss	PFS 7Q	1040 Line 17/ Sch E line 32 Form 1120S and K-1
Self-employment taxes paid	PFS 7I, 17J	1040 Line 57 / Sch SE
Social security benefits—taxable	PFS 7S	1040 Line 20b
Social security benefits—nontaxable	PFS 8B	1040 Line 20a minus 20b
Tax filing status	PFS 6B	1040 Lines 1 thru 5
Trust income	PFS 7Q	1040 Line 17 / Sch E Line 37
Unemployment compensation	PFS 7R	1040 Line 19
Untaxed IRA contributions	PFS 7G	1040 Line 32
Untaxed SEP or SIMPLE contributions	PFS 7H	1040 Line 28

These references are based on the 2015 federal 1040 and schedules and the 2016-17 Parents' Financial Statement (PFS). Line references are subject to change for succeeding years and may be different for prior tax years.