

California State University, Long Beach

Election to Utilize Personal Exemption

For payments made on or after January 1, 2001 all amounts paid to US Citizens and Resident Aliens in the form of scholarships, fellowships, grants, and financial aid are not required to be reported to the IRS by the payor to reflect the new regulations under I.R.C. §§ 1441-1464 and related sections of the Internal Revenue Code. (IRS Notice 87-31)

Student Information

Last Name: _____ First Name: _____

Individual Taxpayer Identification Number (if applicable): _____
(If the scholarship exceeds the annual personal exemption amount or the current year tuition, fees and qualified expenses then student MUST apply for an Individual Taxpayer Identification Number.)*

Acknowledgement

I am accepting this scholarship and acknowledge that I am utilizing my personal exemption to exclude this payment from tax withholding and reporting. I am aware that I may only utilize my personal on one income source per year. I have not utilized this personal exemption from any other scholarship or income source.

Certification

I certify that the information contained on this form is to the best of my knowledge and belief, true and complete.

Signature of Student: _____ Date: _____