



How to Complete Your Grad Student Tax Return

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Personal Finance for PhDs

Hello and welcome to *How to Complete Your Grad Student Tax Return (and Understand It, Too!)*!

I'm Dr. Emily Roberts, the founder of Personal Finance for PhDs. I have a PhD in biomedical engineering, which I earned from Duke University in 2014.

Fellowship (1099-G)  
Training grant (1099-MISC, 1098-T)  
Fellowship (1099-MISC)  
Research assistantship (W-2)  
Fellowship (1099-MISC)

During my 7 years of PhD training, I didn't have a good understanding of my tax situation, especially at the beginning.

My funding source changed from fellowship to training grant to fellowship to assistantship and back to fellowship. The combination of tax forms I received seemed to change almost yearly.

And I made mistakes when preparing my own tax returns because I didn't properly interpret what the numbers on my tax forms meant or know where else I should look for information.

It's only in retrospect, after years of studying how the tax code is interpreted for PhD trainees, that I have a good grasp on my own tax situation from back then.

Make this year your *least stressful* tax preparation process since you entered PhD training

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I don't want you to have to go through what I did, either the mistakes or the years of study. I want this year to be your least stressful tax preparation process since you entered PhD training. I want you to have confidence that you are neither overpaying nor underpaying your income tax.

That's why I created this resource and all my tax resources for PhD trainees. Thank you for joining this workshop and trusting me to teach you.

This workshop is for educational purposes only and does not constitute tax, financial, or legal advice for any individual.

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Before we go on, I need to emphasize the following disclaimer.

I am not an enrolled agent, Certified Public Accountant, Certified Financial Planner, or anything similar.

This workshop is for educational purposes only and does not constitute tax, financial, or legal advice for any individual.

You are entirely responsible for your own tax return and financial decisions.