

### Financial Aid, Student Employment & Military Education Benefits

Mellencamp Hall, Room 162, P.O. Box 469, Milwaukee, WI 53201-0469 Phone: (414) 229-4541 Fax: (414) 229-5699 Email: <u>finaid@uwm.edu</u>

# 2023-24 Clarification of Parent Marital/Tax Filing Status

# IMPORTANT: INCOMPLETE AND/OR CONFLICTING DOCUMENTS WILL BE RETURNED AND WILL RESULT IN PROCESSING DELAYS.

## **Section A – Student Information (Please print clearly)**

STUDENT NAME:	STUDENT ID #:

### Section B – Clarification of Status

The U.S. Department of Education has indicated that your 2023-24 Free Application for Federal Student Aid (FAFSA) may contain conflicting information regarding your parent(s) current marital status and their **2021** federal tax filing status. Please review the table below.

### Your parent must check one box in each column below:

Please Indicate Your Parent(s) (the parent listed on the FAFSA) Marital Status as of the Date your Initial 2023-24 FAFSA was Completed	Please Indicate Your Parent(s) <b><u>Tax Filing</u></b> <u><b>Status</b></u> as Reported on Their <b>2021</b> Federal Income Tax Return
Single or Unmarried	Single
Married or Re-Married	Married Filing Jointly
Date of Marriage/Re-Marriage: / Month Year	Married Filing Separate Return
Divorced Date of Divorce:/ Month Year Separated Date of Separation:/ Month Year Widowed	Head of Household *Please note: If you indicated your marital status is <u>Married or Re-</u> <u>Married</u> and filed taxes as Head of Household, you must also complete sections D and E on page 2
Date Widowed: / Month Year	Qualifying Widower

# ALERT! Please check this box if your FAFSA was originally completed with the wrong filing status. You will need to make a correction to the FAFSA to reflect the correct 2021 filing status before we are able to continue processing aid for 2023-24.

### Section C – Statement of Certification

By signing this worksheet, we certify the information reported is correct to the best of our knowledge.

**Student Signature Parent Signature** Date Date

NOTE: Signatures cannot be typed or stamped. Must be signature

### PLEASE NOTE: SECTIONS D AND E SHOULD ONLY BE COMPLETED IF YOUR PARENT(S) INDICATED THEIR MARITAL STATUS AS `MARRIED/RE-MARRIED' ABOVE AND THEIR FEDERAL TAX RETURN FILING STATUS FOR 2021 WAS `HEAD OF HOUSEHOLD'.

### Section D – Head of Household Eligibility

If your parent(s) were eligible to file as head of household (despite being married), complete this section. Your parent(s) need to <u>initial</u> each of the requirements below if applicable to their tax filing circumstances.

Head of Household Eligibility Requirements	
By initialing next to each requirement, your parent(s) are certifying that they meet this requirement. For more information, please see IRS Publication 17.	
Please note, all three of these requirements must be met, in order to file as Head of Household.	
<ul> <li>Were married but were considered "unmarried" as of December 31, 2021 (Please explain in Section E). The Head of Household filing status is for unmarried individuals who provide a home for certain other persons. Per the Internal Revenue Service (IRS) a person is considered unmarried for this purpose if any of the following applies:</li> <li>Were legally separated according to your state law under a decree of divorce or separate maintenance at the end of 2021. But if, at the end of 2021, the divorce was not final (an interlocutory decree), they are considered married.</li> <li>Were married but lived apart from their spouse for the entire last 6 months of 2021 and meet the other rules under married persons who live apart.</li> <li>Were married to a nonresident alien at any time during the year and did not choose to treat him or her as a resident alien.</li> </ul>	
Paid more than half the cost to run a home in 2021 (rent, mortgage, utilities, etc.).	
Supported a qualifying person for at least half of 2021. A qualifying person is a child, parent, or relative who meets certain conditions that enable you to qualify for Head of Household.	

If it is determined that your parent(s) are legally married and filed their taxes as Head of Household for 2021 incorrectly, they will need to file an amended Federal Income Tax Return (1040X) reflecting the correct filing status. Once completed, the FAFSA form will need to be updated accordingly to reflect the 2021 amended Federal Income Tax Return.

### Section E – Parent Personal Statement

Explain in detail why you, the parent(s), were allowed to file using the Head of Household status given your marital status. In addition, if available, please provide IRS supporting documentation or a letter of explanation from your tax preparer.

#### Parent Signature Date NOTE: Signature cannot be typed or stamped. Must be signature.

If you have any questions, please go to <u>uwm.edu/meetfinaid</u> to make an appointment to speak with a member of our Advising Staff.