



Student Financial Services

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2024-25 Clarification of Parent Marital/Tax Filing Status

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

Section A – Student Information (Please print clearly)

STUDENT NAME:	STUDENT ID #:
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Section B – Clarification of Status

The U.S. Department of Education has indicated that your 2024-25 Free Application for Federal Student Aid (FAFSA) may contain conflicting information regarding your parent(s) current marital status and their **2022** 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 2024-25 FAFSA was Completed	Please Indicate Your Parent(s) Tax Filing Status as Reported on Their 2022 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	Head of Household
Date of Divorce: _____ / _____ Month Year	*Please note: If you indicated your marital status is <u>Married or Re-Married</u> and filed taxes as Head of Household, you must also complete sections D and E on page 2
Separated	Qualifying Widower
Date of Separation: _____ / _____ Month Year	
Widowed	
Date Widowed: _____ / _____ Month Year	

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 2022 filing status before we are able to continue processing aid for 2024-25.

Section C – Statement of Certification

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

Student Signature	Date	Parent Signature	Date
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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 2022 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 initial 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.

- ____ Were married but were considered “unmarried” as of December 31, 2022 (**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:
- Were legally separated according to your state law under a decree of divorce or separate maintenance at the end of 2022. But if, at the end of 2022, the divorce was not final (an interlocutory decree), they are considered married.
 - Were married but lived apart from their spouse for the entire last 6 months of 2022 and meet the other rules under married persons who live apart.
 - 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.
- ____ Paid more than half the cost to run a home in 2022 (rent, mortgage, utilities, etc.).
- ____ Supported a qualifying person for at least half of 2022. 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 2022 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 2022 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 uwm.edu/meetsfsc to make an appointment to speak with a member of our Advising Staff.