



**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: [finaid@uwm.edu](mailto:finaid@uwm.edu)

## 2019-20 Clarification of Student Marital/Tax Filing Status

**IMPORTANT: YOU SHOULD SUBMIT THE APPROPRIATE DOCUMENTS AS SOON AS POSSIBLE. INCOMPLETE AND/OR CONFLICTING DOCUMENTS WILL BE RETURNED AND WILL RESULT IN PROCESSING DELAYS AND MAY RESULT IN LESS FINANCIAL ASSISTANCE BEING AVAILABLE.**

### 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 2019-20 Free Application for Federal Student Aid (FAFSA) may contain conflicting information with regard to your current marital status and your **2017** federal tax filing status. Please review the table below. **You must check one item in the left column and then one box in the column directly across from that category.**

Please Indicate Your Marital Status <b>as of the Date the Original FAFSA 2019-20 was Completed</b>	Please Indicate Your Tax Filing Status as Reported on Your <b>2017</b> Federal Income Tax Return
Single or Unmarried	Single Head of Household
Married or Re-Married Date of Marriage/Re-Marriage: ____/____/____ Month Year	Married Filing Jointly Married Filing Separate Return Head of Household ( <b>must also complete section C and D</b> ) on page 2
Divorced Date of Divorce: ____/____/____ Month Year	Single Married Filing Jointly Married Filing Separate Return Head of Household
Separated Date of Divorce/Separation: ____/____/____ Month Year	Single Married Filing Jointly Married Filing Separate Return Head of Household
Widowed Date Widowed: ____/____/____ Month Year	Single Married Filing Jointly Head of Household Qualifying Widower

If based upon your marital status as of the date of the original 2019-20 FAFSA (first column), the appropriate tax filing status for 2017 is not listed (second column), please explain. Please make sure to indicate the tax filing status used and the date of marital status changing, if not already indicated.

**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 2017 filing status before we are able to continue processing aid for 2019-20. Please skip sections C and D, complete Section E with necessary signatures.**

**PLEASE NOTE: SECTIONS C AND D SHOULD ONLY BE COMPLETED BY THOSE WHO ANSWERED MARRIED/RE-MARRIED AND THEIR FEDERAL TAX RETURN FILING STATUS FOR 2017 WAS HEAD OF HOUSEHOLD.**

## **Section C – Head of Household Eligibility**

If you were eligible to file as head of household (despite being married), complete this section. Please initial each of the requirements below if applicable to your tax filing circumstances.

### **Head of Household Eligibility Requirements**

By initialing next to each requirement, you are certifying that you meet the 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, 2017 (**Please explain in Section D**). 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 2017. But if, at the end of 2017, the divorce wasn't final (an interlocutory decree), you are considered married.
- Were married but lived apart from your spouse for the entire last 6 months of 2017 and you 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 your home in 2017 (rent, mortgage, utilities, etc.).

Supported a qualifying person for at least half of 2017. 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 you are legally married and filed taxes as Head of Household for 2017 incorrectly, you 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 2017 amended Federal Income Tax Return.

## **Section D – Personal Statement**

Explain in detail why you 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.

## **Section E – Statement of Certification**

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

**Student Signature**

**Date**

**Spouse Signature (if married)**

**Date**

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

If you have any questions, please contact a member of our financial aid advising staff.