



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

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2022-23 Clarification of Student 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 #:
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Section B – Clarification of Status

The U.S. Department of Education has indicated that your 2022-23 Free Application for Federal Student Aid (FAFSA) may contain conflicting information with regard to your current marital status and your **2020** federal tax filing status. Please review the table below.

You must check one box in each column below:

Please Indicate Your Marital Status as of the Date your Initial 2022-23 FAFSA was Completed	Please Indicate Your Tax Filing Status as Reported on your 2020 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 2020 filing status before we are able to continue processing aid for 2022-23.

Section C – 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
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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 YOU INDICATED YOUR MARITAL STATUS AS 'MARRIED/RE-MARRIED' ABOVE AND YOUR FEDERAL TAX RETURN FILING STATUS FOR 2020 WAS 'HEAD OF HOUSEHOLD'.

Section D – 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 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, 2020 (**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 2020. But if, at the end of 2020, 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 2020 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 2020 (rent, mortgage, utilities, etc.).

____ Supported a qualifying person for at least half of 2020. 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 2020 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 2020 amended Federal Income Tax Return.

Section E – 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.

Student Signature

Date

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

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