## Parent Marital-Tax Filing Status Discrepancy

ONLY THE PARENT(S) COMPLETES THIS FORM. Your 2016-2017 Free Application for Federal Student Aid (FAFSA) has been reviewed and there is a discrepancy with the parent’s marital status and tax filing status reported. Listed below are the general eligible filing statuses based on marital status as determined by the Internal Revenue Service’s tax filing guide, Publication 17.

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Tax Filing Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married, Remarried</td>
<td>Married Filing Jointly, Married Filing Separately</td>
</tr>
<tr>
<td>Divorced, Never Married</td>
<td>Single, Head of Household</td>
</tr>
<tr>
<td>Separated (last 6 months of 2015)</td>
<td>Married Filing Jointly, Married Filing Separately, Head of Household</td>
</tr>
<tr>
<td>Widowed</td>
<td>Single, Head of Household, Qualifying Widow(er) with dependent child</td>
</tr>
</tbody>
</table>

### Section I: TAX FILING STATUS

After reviewing the above chart, please check the box that best applies and follow the corresponding **Action Required**:

<table>
<thead>
<tr>
<th>Status</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ My tax filing status is correct, but I reported the incorrect marital status.</td>
<td>Please complete section II.</td>
</tr>
</tbody>
</table>
| □ My marital status is correct, but my tax filing status is incorrect. | You and/or your spouse are required to amend the 2015 tax returns to the correct tax filing status. Submit the following documents:  
  1. Complete and submit a signed copy of your 2015 IRS form 1040X.  
  2. If not already submitted, submit a copy your 2015 IRS Tax Return Transcript. |
| □ My marital status is correct and my tax filing status is correct.     | Please complete the following Part A and B.                                                          |

### PART A:

You indicated that you are able to file a tax status that is generally not allowed for your marital status. Please provide an explanation of why you are allowed this exception. **Additional information or supporting documentation may be requested based on the response provided.**

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### PART B:

If you are married, and one or both of you filed Head of Household, you must also submit supporting documentation of your being eligible to file as Head of Household. Supporting documentation includes: lease, mortgage statement, etc.
**Section II: MARITAL STATUS**

Check your **Marital Status** below and follow the **Action Required**:

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ MARRIED – prior to completing the FAFSA</td>
<td>Please attach a copy of the marriage license or certificate.</td>
</tr>
<tr>
<td>□ MARRIED – after completing the FAFSA</td>
<td>Please attach a copy of the marriage license or certificate.</td>
</tr>
<tr>
<td></td>
<td>If you are requesting your marital status updated, you must submit:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>Federal Income Tax filed</strong>: If you and/or your spouse filed federal income taxes in 2015 - submit a copy of your and your spouse’s 2015 IRS tax return transcript.</td>
</tr>
<tr>
<td></td>
<td>2. <strong>Earned Wages or Income, but are not required to file federal income tax return</strong>: Submit a copy of your, and/or your spouse’s 2015 IRS Wage and Income Transcript.</td>
</tr>
<tr>
<td>□ DIVORCED</td>
<td>Please attach a copy of the final court ordered divorce decree.</td>
</tr>
<tr>
<td>□ NEVER MARRIED</td>
<td>Please complete Part C.</td>
</tr>
<tr>
<td>□ SEPARATED</td>
<td>Please complete Part D.</td>
</tr>
<tr>
<td>□ Unmarried and Living Together</td>
<td>Please complete Part E.</td>
</tr>
<tr>
<td>□ WIDOWED</td>
<td>Please attach a copy of the obituary, death certificate, or other proof.</td>
</tr>
</tbody>
</table>

**Part C: NEVER MARRIED**

You indicated that there was an error when you reported your marital status on your FAFSA, that your marital status is actually **never married**. Please provide an explanation as to why you reported a status other than **never married** on the FAFSA.

I certify that all the information provided on this form is complete and correct. By signing this form permission is given to the Office of Student Financial Aid to make corrections electronically to my application if there are differences between my application and my submitted documentation.

Parent 1 Signature  
Date

Parent 2 Signature (required if married or remarried)  
Date

**WARNING**

Purposely giving false or misleading information may result in a fine, jail sentence, or both.

STOP here if you checked married/remarried, divorced, never married, or widowed. You are only required to complete SECTION I and II.
Part D: SEPARATED
This section is only completed if the response to current marital status is SEPARATED in Section II. **Marital separation is defined as:** (a) One of the partners has left the household for an indefinite period; and (b) the marriage is severed. If your circumstance does not meet this definition, then you are required to submit your spouses’ information. You must meet both parts of the definition to be considered separated. You must complete this section and provide **each** of the three following items:

1. **CERTIFICATION AND STATEMENT OF MARITAL SEPARATION:** Please complete the certification statement below with names, dates, notarization, and signature(s).

2. **REFERENCE LETTERS:** Please attach two (2) letters from reputable third party sources (not a relative or a friend) who can endorse confirmation of your separation claim in their professional capacity on their business letterhead. For example, your pastor or rabbi, your marriage counselor, or your attorney can provide such a letter. **If you do not provide these two (2) reference letters, you will be required to provide your spouse’s information.** You must provide progressive documentation each year.

3. **SUPPORTING DOCUMENTATION:** Please attach a copy of your 2015 Internal Revenue Service (IRS) Wage and Income Transcripts, and copies of documents which are in your name only (such as utility bills or lease/rental/mortgage documents).

**CERTIFICATION AND STATEMENT OF MARITAL SEPARATION**

I, ____________________________, do hereby certify that my current marital status is separated from

my spouse, ____________________________, since __________ / __________. I certify that we are and have continued living separated and the marriage is severed.

I certify the above statement as true and accurate with my signature and notarization by notary public. Additionally, I understand that I am responsible for returning all student financial aid monies received due to inaccurate, false or misleading information provided on this form.

Parent 1 Signature ______________________ Date ________________

NOTARIZATION:
Part E: Unmarried & Living Together

This section is only completed if the response to current marital status is Unmarried and Living Together in Section I of this form. **Unmarried and Living Together is defined as:** (1) You are the biological and/or adoptive parents of the student; (2) are not married; (3) and currently live in the same residence. The parent must complete this section and provide each of the following items:

- **CERTIFICATION OF MARITAL AND RESIDENCE STATUS:** Please complete the certification statement below with names, notarization, and signature(s).

- **SUPPORTING DOCUMENTATION:** Please attach a copy of both parents 2015 IRS tax return transcripts, if not already submitted. Please attach copies of documents which show each parent’s name, separately or jointly, with the same address; such as utility bills or lease/rental/mortgage documents.

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**CERTIFICATION OF MARITAL AND RESIDENCE STATUS**

I, ________________________________, do hereby certify that my current marital status is unmarried to ________________________________ and that we are the biological and/or adoptive parents of the student, ________________________________. I certify that as the biological and/or adoptive parents of the student, we both are unmarried and living in the same residence.

I certify the above statement as true and accurate with my signature and notarization by notary public. Additionally, I understand that I am responsible for returning all student financial aid monies received due to inaccurate, false or misleading information provided on this form.

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NOTARIZATION:

Parent 1 Signature ___________________________ Date ___________________________