WILMINGTON UNIVERSITY™
STUDENT FINANCIAL SERVICES

Office of Financial Aid
220 Doberstein Admissions Center
320 N Dupont Highway
New Castle, DE 19720
Fax: 302) 328-8905
Email: Finaid@wilmu.edu

2023-2024 Marital and Tax Filing Status Verification

Student Information:

_____ XXX-XX_____ W00_____
Last Name First M.I. Last 4 Social Security No. Student I.D.

_____ _____
Address City State Zip Code Phone Number

Instructions:

One of the areas that the Department of Education requires Financial Aid administrators to verify is your (or your parents') tax filing status. On your FAFSA you answered questions concerning your (or your parents') marital status. Your FAFSA or other documents submitted indicate that you (or your parents) are married, but according to your (or your parent) income tax return you have filed "Head of Household" or "Single". IRS Publication 17 states that a married person can only file income taxes as "Married Filing Jointly" or "Married Filing Separately".

A: UNMARRIED IN 2021: ☐ **I was not married to my current spouse in 2021, but married when FAFSA was completed**

- If you checked this box, you must attach a copy of your marriage license or other proof of your marriage date to this form
- Submit a 2021 Tax Return Transcript for you and your spouse. Even though you did not file taxes as married during 2021, the FAFSA requires the income information to be completed based on your current marital status.

B: CONSIDERED MARRIED: For tax purposes, you may be a married person and are considered married for the whole year if on December 31, 2021 you and your spouse met ANY ONE of the following criteria (2021 IRS Publication 17, Part 1, Section 2). Check any that you can answer "yes" to.

- ☐ You are married and living together
- ☐ You are living together in a common law marriage that is recognized in the state where you now live or in state where the common law marriage began
- ☐ You are married and living apart, but not legally separated or under a mutual separation agreement
- ☐ You are separated under an interlocutory (not final) decree of divorce.

If you said "yes" to one of the questions above, that means you are considered married and were <u>not</u> eligible to file a 2021 IRS income tax return as "Head of Household" or "Single". You must file an amended 2021 tax return to the IRS, and send the following to the Financial Aid Office:

	(Attached)
1. A signed copy of this Head of Household Worksheet	☐
2. A signed, amended tax return (1040X)	☐
3. A signed, original tax return transcript (if not submitted already)	☐
4. A 2023-24 Verification Worksheet (if not submitted already)	☐

If you are "considered unmarried" by the IRS, and you were eligible to file your 2021 Federal Income Taxes as "Head of Household", please submit a written explanation as to why, and attach supporting documentation provided by your tax preparer or other source.

<u>THIS DOCUMENT WILL NOT BE ACCEPTED AS COMPLETE UNLESS REQUIRED ADDITIONAL DOCUMENTATION IS ATTACHED.</u>

Each person signing this form certifies that all of the information is complete and correct. If dependent, at least one parent must sign.

_____ _____
Student's Signature Date Dependent Student Parent's Signature Date