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Last Name	First Name	Middle Init.

Marital Status Correction/Clarification Form 2022-2023 – STUDENT

We need clarification on your income information based on a recent marital status change that: 1) you informed us that you have separated, divorced, or been widowed since you originally filed your FAFSA, or 2) you mistakenly reported both your and your spouse's incomes even though they were separated, divorced, or widowed at the time you filed your FAFSA. *See the last page of this form for more information on whose information should be included if you are now re-married.* Once completed, please print, sign, and return this form and other documents to our office through the UU Financial Aid Dropbox. Information on using Dropbox can be found here - www.uu.edu/financialaid/verify. Please do not email forms with Sensitive Personal Information. If you have questions, please contact our office for assistance.

Please provide:

- _____ 1) This signed, completed form
- _____ 2) A signed copy of your 2020 federal tax return
- _____ 3) Copies of all your 2020 W-2s and/or signed Schedule C's (or other signed tax Schedules if you earn income from another method not shown through a Schedule C, i.e. farming income, etc.).
- _____ 4) If you experienced a change in marital status after the FAFSA was completed, additionally provide 1) a brief letter to explain the situation including relevant dates **-AND-** 2) supporting documentation such as court orders, legal documents, etc.

We may request additional information once your documents are initially reviewed.

Blank is NOT a valid answer (enter a zero or N/A). Please sign where indicated.

Section A: Student Taxable Income January 2020 – December 2020	Amount
Unemployment Compensation	\$
Interest or Dividend Income	\$
Business or Farm Income (or Loss)	\$
Capital Gains (or Loss)	\$
IRA or Pension Distribution	\$
Rental Income or Partnership Income/Royalties	\$
Other:	\$

Section B: Student Untaxed Income January 2020 – December 2020	Amount
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S. Do not include amounts reported in code DD (employer contributions toward employee health benefits).	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1 – total of line 15 + line 19.	\$
Child support received for any of your children. Do not include foster care or adoption payments.	\$
Tax-exempt interest income from IRS Form 1040 – line 2a	\$
Untaxed portions of IRA distributions or pensions from IRS Form 1040 lines (4a+4c) minus (4b+4d). Exclude rollovers. If negative, enter a zero here.	\$

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Section B: Student Untaxed Income January 2020 – December 2020 (Continued)	Amount
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
Veteran's non-education benefits, such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
Other untaxed income and benefits not reported elsewhere on the FAFSA, such as workers compensation, disability benefits, foreign income not taxed by any government, etc. that you received in 2020. Also include the untaxed portions of Health Savings Accounts from IRS Form 1040 Schedule 1-line 12. Do not include extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes cash support you (and if married, your spouse) received in 2020 from a friend or relative (other than your parents , if you're a dependent student). Report the amount if it isn't reported elsewhere on the FAFSA already. If someone is paying your rent, utility bills, etc., while you attend school, include the amount of that person's contributions, unless the person is your parent whose information is reported on the FAFSA. Also include money that you received from a parent or other person whose financial information isn't reported on this form and that isn't part of a legal child support agreement. This also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as, your grandparents, aunts, uncles, and noncustodial parents) in 2020.	\$

Section C: Student Income Exclusions January 2020 – December 2020	Amount
Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3 - line 3.	\$
Child support you PAID because of divorce or separation or as a result of a legal requirement. Do not include support for children living in your household, as reported in the household size question on the FAFSA.	\$
Taxable earnings from need-based employment programs, such as Federal or state Work-study and need-based employment portions of fellowships and assistantships.	\$
Student grants and/or scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. Note: This is not the total amount of grants and scholarships you received in 2020 (as reported on the 1098T) - it is the taxable amount of grants and scholarships you included on your tax return. If you enter an amount here it means: 1) that you filed a federal tax return and 2) you included grants and/or scholarships as part of the income reported on the tax return.	\$
Combat pay or special combat pay. This should be zero for enlisted persons and warrant officers (including commissioned warrant officers) because your combat pay is entirely non-taxable. Only enter the amount that was taxable and included in your parent's adjusted gross income. Commissioned officers should use the total combat pay from the leave and earnings statements of your parent(s) and subtract the untaxed portion, which is reported in box 12 of the W-2 form with code Q.	\$
Earnings from work under a cooperative education program offered by a college. A cooperative education program is an educational system in which students may earn academic credit for career work done in their field of study (i.e. a paid internship for which you also earned credit).	\$

Section D: Student Assets at FAFSA submittal (see next page for more info)	Amount
Cash, Savings and Checking Accounts as of the date the 2022-23 FAFSA was filed. Do not include funds from previous financial aid.	\$
Investment* net worth** (current value minus debt), including real estate as of the date the 2022-23 FAFSA was filed. Do not include the value of retirement accounts such as a 401(k) or IRA, or the value of your primary residence.	\$
Net worth** of business*** (business value minus debt) and/or farm (farm value minus debt) as of the date the 2022-23 FAFSA was filed. Do not include the value of a small business that you own and control and that has 100 or fewer full-time or full-time equivalent employees. Do not include the value of a family farm that you live on and operate.	\$

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Student ID:

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Section E: Student Household Size (see below for more information) ****				
Full Name	Age	Relationship to Student	Is this person attending college at least half-time in 2022-2023?	College attending in 2022-2023 (If applicable) ^
		<i>Self</i>	<i>Yes</i>	<i>Union University</i>

Additional directions for Section E

*Investments **do not include** the home you live in, the value of life insurance and retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) and prepaid tuition plans, cash, savings and checking accounts already reported. Investments **do include** real estate, trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, Coverdale savings accounts, college savings plans, installment, and land sale contracts (including mortgages held), commodities, etc. *Investment value* includes the market value of these investments as of today. *Investment debt* means only those debts that are related to the investments.

**Net worth means current value minus debt. If net worth is negative, enter 0.

***Business (of more than 100 employees) or investment farm value includes the market value of land, buildings, machinery, equipment, and inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Additional directions for Section F

**** Include in your household:

- Yourself (the student).
- Your spouse if you are married.
- Your or your spouse’s children if you or your spouse will provide more than half of the children’s support from July 1, 2022, through June 30, 2023, even if a child does not live with you.
- Other people if they now live with you, and you or your spouse provides more than half of the other person’s support, and will continue to provide more than half of that person’s support from July 1, 2022 through June 30, 2023.

^Count yourself as a college student. Include others only if they will attend at least half-time in 2022-2023 in a program that leads to a college degree or certificate.

Acknowledgment

By signing below, I certify that the above information is true and correct to the best of my knowledge and belief. If asked by an authorized official, I agree to provide additional proof of the information provided on this form. I understand that purposely providing false or misleading information on this form may result in reduction of financial aid, fines and/or imprisonment in this and/or future years.

Signature:

Student Name: _____ Date: _____



UNION UNIVERSITY
Student Financial Planning

Student ID:

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(You do not need to return this page – it is for informational purposes only)

*The 2022-2023 FAFSA asks for your marital status as of the date the FAFSA was completed, but it asks for your income and tax return information from 2020. Therefore, your marital status may be different than it was when the 2020 tax return was filed.

What if my marital status as of the date my 2022-2023 FAFSA was filed is different than the marital status reported on my 2020 tax return?

- If you filed a joint tax return for 2020 but were no longer married when you filed the 202-2023 FAFSA, you will need to subtract the tax and income information for your former spouse to correctly answer the required questions on this form.
- If you did not file a joint tax return for 2020 but were married or re-married when you filed the 2022-2023 FAFSA, you will need to add the 2020 tax and income information for your current spouse to correctly answer the FAFSA questions when you are answering the required questions on this form.

What if my current spouse is different from the spouse listed on my 2020 tax return?

- If you filed a joint tax return for 2020 but were married to a different person when you filed the 2022-2023 FAFSA, you will need to subtract the tax and income information for your former spouse, and then add the 2020 tax and income information for your current spouse to correctly answer the required questions on this form.

What if I am recently widowed?

- If you were recently widowed, you'll need to subtract the tax and income information for your spouse to correctly answer the required questions on this form. Please contact Student Financial Aid Services for information and options available to you if you feel the information reported no longer accurately represents your financial situation.