



UNION UNIVERSITY
Student Financial Planning

Student ID:

Last Name	First Name	Middle Init.

Marital Status Correction/Clarification Form 2024-2025 - PARENT

We need clarification on your parent's income information based on a recent marital status change because: 1) you informed us that your parents have separated, divorced, or been widowed since you originally filed your FAFSA, or 2) you mistakenly reported both parental incomes even though they were separated, divorced, or widowed at the time you filed your FAFSA or 3) your parent marital status has changed since the FAFSA was filed. *See the last page of this form for more information on whose information should be included if your parent is now re-married.* Once completed, please print, sign, and return this form and other documents to our office through the Self-Service account. Information on using Self-Service can be found here - <https://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 from your FAFSA parent
- _____ 2) A signed copy of your FAFSA parent's 2022 federal tax return
- _____ 3) Copies of all your FAFSA parent's 2022 W-2s and/or signed Schedule C's (or other signed tax Schedules if your parent earns income from another method not shown through a Schedule C, i.e. farming income, etc.).
- _____ 4) If your parent experienced a change in marital status after the FAFSA was completed, additionally have your parent 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: FAFSA Parent Taxable Income January 2022 – December 2022	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: FAFSA Parent Untaxed Income January 2022 – December 2022	Amount
Payments to tax-deferred pension & retirement 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 16 + line 20.	\$
Parent child support received for any children. Do not include foster care or adoption payments.	\$
Tax-exempt interest income from IRS Form 1040–line 2a.	\$

Continued next page



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Section B: FAFSA Parent Untaxed Income Jan 2022 – Dec 2022 (Continued)	Amount
Untaxed portions of IRA distributions or pensions from IRS Form 1040 lines (4a minus 4b) plus (lines 5a minus 5b). Exclude rollovers. If negative, enter a zero here.	\$
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, Black Lung Benefits, untaxed portions of Railroad Retirement Benefits, foreign income not earned from work, disability benefits, etc., that your parents received in 2022. Also include the untaxed portions of health savings accounts from IRS Form 1040 line 13. 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.	\$

Section C: FAFSA Parent Income Exclusions for January 2022 – December 2022	Amount
Parent education credits from IRS Form 1040 Schedule 3 - line 3.	\$
Child support your parents PAID because of divorce or separation or as a result of a legal requirement. Do not include support for children living in parent household, as reported in the household size of the FAFSA.	\$
Parents' 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 <u>reported to the IRS in your parent's adjusted gross income</u> . Include AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grants or scholarship portions of fellowships and assistantships. Note: This is not the total amount of grants/scholarships received in 2022 (as reported on the 1098T) - it is the taxable amount of grants/scholarships included on the tax return. If you enter an amount here it means: 1) that your parent filed a federal tax return and 2) your parent included grants/scholarships as part of their income reported.	\$
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 credit was also earned).	\$

Section D: FAFSA Parent Assets at FAFSA Submittal (see next page for more info)	Amount
Cash, savings and checking accounts as of the date the 2024-25 FAFSA was filed. Do not include financial aid residual funds.	\$
Investment* net worth** (current value minus debt), including real estate as of the date the 2024-25 FAFSA was filed. Do not include the value of retirement accounts, primary residence, etc. (see more information on next page).	\$
Net worth** of business*** (business value minus debt) and/or farm (farm value minus debt) as of the date the 2024-25 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.	\$

Continued next page



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_____	_____	_____
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Section E: Parent Household Size (see below for more information) ****

Full Name	Age	Relationship to Student	Is this person attending college at least half-time in 2024-2025?	College attending in 2024-2025 (if applicable) ^
		Student	Yes	Union University
		Parent	NA	NA

Additional Directions for Section D

*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.), ABLE accounts, prepaid tuition plans, cash, savings and checking accounts already reported. Investments **do include** real estate (other than primary residence), rental property, trust funds, UGMA or UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, and qualified educational benefits or savings programs like Coverdell accounts, 529 savings plans, and refund value of prepaid 529 tuition plans. *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 E

****Include in the **parent's household**:

- Yourself (the student).
- Your parent(s) (including step-parent and parents living together but unmarried) even if you do not live with them;
- Your parents' other children if a) your parents will provide more than half of their financial support from July 1, 2024 through June 30, 2025, OR if b) the other children would be required to provide parental information if they were completing the FAFSA for 2024-2025. Include children who meet either of these standards, even if a child does not live with your parents.
- Other people if a) they now live with your parents AND b) your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2024 through June 30, 2025.

^Include the student completing the FAFSA. Do not include the parent. Include others from the household only if they will attend at least half-time in 2024-2025 in a program that leads to a college degree or certificate. **Do not** include students as a U.S. service academy.

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.

Student Signature _____ Date: _____

Parent Signature: _____ Date: _____



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

*The 2024-2025 FAFSA asks for parents' marital status as of the date the 2024-2025 FAFSA was completed, but it asks for parental income and tax return information from 2022. Therefore, marital status may be different than it was when the 2022 tax return was filed.

What if my marital status as of the date my student's 2024-2025 FAFSA was filed is different than the marital status reported on my 2022 tax return?

- If you filed a joint tax return for 2022 but were no longer married when your student filed the 2024-2025 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 2022 but were married or re-married when your student filed the 2024-2025 FAFSA, you will need to add the 2022 tax and income information for your current spouse to correctly answer the FAFSA questions when you are answering the required questions on this form. ***Make sure your new spouse's demographic information is included on your student's FAFSA.***

What if my current spouse is different from the spouse listed on my 2022 tax return?

- If you filed a joint tax return for 2022 but were married to a different person when your student filed the 2024-2025 FAFSA, you will need to subtract the tax and income information for your former spouse, and then add the 2022 tax and income information for your current spouse to correctly answer the required questions on this form. ***Make sure your new spouse's demographic information is included on your student's FAFSA.***

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 Planning for information and options available to you and your student if you feel the information reported no longer accurately represents your family financial situation.