



UNION UNIVERSITY
Student Financial Planning

Student ID:

Last Name	First Name	Middle Init.

Marriage Appeal Form 2024-2025 – STUDENT

Congratulations on your recent marriage! Student Financial Planning needs documentation of your marriage, certain financial documents, and this completed form, before we can adjust your FAFSA to reflect this change:

Please provide:

- _____ 1) This signed, completed form
- _____ 2) A copy of your official Marriage Certificate
- _____ 3) A signed copy of your and your spouse's signed 2022 federal tax return (if applicable)
- _____ 4) Copies of all of both your and your spouse's 2022 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.).

Blank is NOT a valid answer (enter a zero or N/A).

Section A: Student and Spouse Taxable Income January 2022 – December 2022	Student + Spouse 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 and Spouse Untaxed Income January 2022 – December 2022	Student + Spouse 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.	\$
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 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 you 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.	\$
Cash support you (and your spouse) received or was paid on your behalf (e.g., bills), in 2022 from a friend or relative. Report the amount if it isn't reported elsewhere on this application. If someone is paying your rent, utility bills, etc., while you attend school, include the amount of that person's contributions. 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. Note: This 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).	\$

Section C: Student and Spouse Income Exclusions January 2022–December 2022	Student + Spouse Amount
Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3 - line 3.	\$

Continued next page



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Section C: Student and Spouse Income Exclusions January 2022–December 2022 (Continued)	Student + Spouse Amount
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. Include 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 and Spouse Assets at FAFSA Submittal (see below for more info)	Student + Spouse Amount
Cash, Savings and Checking Accounts as of the date the 2024-2025 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 2024-2025 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 2024-2025 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.	\$

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.

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 2023-2024?	College attending in 2023-2024 (if applicable)
		Self	Yes	Union University

Additional Directions for Section E**

**** Include in your household:

- Yourself (the student)
- Your spouse
- Your or your spouse's children if you or your spouse will provide more than half of the children's support from July 1, 2024, through June 30, 2025, 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, 2024 through June 30, 2025.

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: _____

Spouse Signature: _____

Date: _____



Section F: (if BOTH you & your spouse filed taxes in 2022, skip this section)

1) Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2023 indicating a 2022 IRS income tax return was not filed (for spouse as well if married and applicable) –

(see instructions after signature section on how to request a Verification of Non-Filing Letter (VNF) from the IRS).

Confirmation of non-filing is provided (for both myself and my spouse if applicable)

Confirmation of non-filing has been requested and will be provided upon receipt (for both myself and my spouse if applicable)

I/we attempted to obtain the VNF from the IRS or other tax authorities more than 10 days ago and have been unable to obtain the required documentation

2) Check the boxes that apply and complete the table below:

Neither I nor my spouse was employed and we had no income earned from work in 2022.

I or my spouse was employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form was provided. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	IRS W-2 Provided?	Whose Income?	Amount Earned in 2022
<i>(Example) ABC's Auto Body Shop*</i>	Yes	SELF	\$4,500.00
Total Amount of Income Earned From Work			\$

3) Provide a copy of the W-2 for each employer listed above.

- If you do not have a copy of your W-2, use IRS form 4506-T and select box 8 to request a copy from the IRS (<https://www.irs.gov/uac/about-form-4506t>)

Requesting a Verification of Non-Filing Letter from the IRS

Non-filers can request a Verification of Non-Filing Letter (VNFL), free of charge, from the IRS in 1 of 2 ways – online or paper request. Once received, submit a copy of the IRS Verification of Non-Filing Letter to our office; make sure to include your name and V# number on the letter. You can upload this through Vandal Web if in PDF or JPG format.

Online Request – Available at www.irs.gov

- Click "Get My Tax Record"
- Click "Get Transcript Online"
- Create account or log in to IRS (If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may order a copy of the non-filing letter using the paper request – see below)
- Once logged in select "Verification of Non-Filing Letter" for tax year 2022

Paper Request Form – IRS Form 4506T

- Download IRS Form 4506-T at <https://www.irs.gov/uac/about-form-4506t>
- Complete lines 1 – 4 following the instructions on page 2 of the form
- Line 3: enter the non-filer's address and zip code; use the address currently on file with the IRS (or with the US Postal Service)
- Line 7: Select the checkbox on the right-hand side for VNFL
- Line 9: Year or period requested field, enter "12/31/2022"
- The non-filer must sign and date the form & enter their phone number
- Mail or fax the completed IRS Form 4506-T to the proper address (or fax number) provided on page 2 of Form 4506-T
- If the 4506-T info is successfully validated, non-filers can expect to receive a paper IRS VNFL at the address provided in 5 to 10 business days

Section F Acknowledgment (if required)

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: _____

Spouse Signature: _____ Date: _____