

## 2024-25 Parent Marital and Tax Filing Status Verification

### STUDENT INFORMATION

Student Name \_\_\_\_\_ Student ID \_\_\_\_\_

Do not complete this form if it has not been requested. Your 2024-25 FAFSA has possible conflicting information regarding your parent's marital status and tax filing status. Please have your parent complete the chart below.

### Section I – Marital Status

PARENT: What was your marital status as of the date your student completed the 2024-2025 FAFSA?	PARENT: Please indicate your tax filing status as stated on your 2022 federal tax return.
<input type="checkbox"/> Single or Unmarried	<input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Other*
<input type="checkbox"/> Married or Remarried Date of Marriage: _____	<input type="checkbox"/> Married Filing Jointly <input type="checkbox"/> Married Filing Separately (you must report both your and your spouse's income on the FAFSA) <input type="checkbox"/> Other*
<input type="checkbox"/> Divorced or Separated Date of Divorce/Separation: _____	<input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Other*
<input type="checkbox"/> Widowed Date Widowed: _____	<input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly (Additional documentation may be required) <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widower (By checking this box you certify you are a qualifying widower and have provided only the surviving spouse's income on the FAFSA) <input type="checkbox"/> Other*
<input type="checkbox"/> Unmarried, Both Parents Live Together	<input type="checkbox"/> Single _____ <input type="checkbox"/> Head of Household <small>Parent Name(s)</small> _____ <input type="checkbox"/> Other* <small>Parent Name(s)</small> _____

**If you are legally married and you (or your spouse) filed Head of Household, a tax return transcript and a signed and dated amended tax return (1040X) may be required to correct your filing status with the IRS. After the 1040X is processed by the IRS, you may be requested to submit a tax account transcript to the Office of Financial Aid.**

**PLEASE NOTE: SECTIONS II AND III SHOULD ONLY BE COMPLETED IF YOUR PARENT(S) ANSWERED MARRIED/RE-MARRIED AND THEIR FEDERAL TAX RETURN FILING STATUS FOR 2022 WAS HEAD OF HOUSEHOLD.**

## Section II – Head of Household Eligibility

If your parent(s) were eligible to file as head of household (despite being married), complete this section. Your parent(s) must initial each of the requirements below, if applicable to their tax filing circumstances.

### Head of Household Eligibility Requirements

By initialing next to each requirement, your parent(s) are certifying that they meet this requirement. For more information, please see IRS Publication 17.

**Please note, all three of these requirements must be met, in order to file as Head of Household.**

- Were married but were considered “unmarried” as of December 31, 2022 (**Please explain in Section III**). The Head of Household filing status is for unmarried individuals who provide a home for certain other persons. Per the Internal Revenue Service (IRS), a person is considered unmarried for this purpose if any of the following apply:
- Were legally separated according to your state law under a decree of divorce or separate maintenance at the end of 2022. But if, at the end of 2022 the divorce was not final (an interlocutory decree), they are considered married.
  - Were married, but lived apart from their spouse for the entire last 6 months of 2022 and meet the other rules under married persons who live apart.
  - Were married to a nonresident alien at any time during the year and did not choose to treat him or her as a resident alien.
- \_\_\_ Paid more than half the cost to run a home in 2022 (rent, mortgage, utilities, etc.).
- \_\_\_ Supported a qualifying person for at least half of 2022. A qualifying person is a child, parent or relative who meets certain conditions that enable you to qualify for Head of Household.

If it is determined that your parent(s) are legally married and incorrectly filed their taxes as Head of Household for 2022, they will need to file an Amended Federal Income Tax Return (1040X) for the 2022 tax year reflecting the correct tax filing status. Once completed, the FAFSA form will need to be updated accordingly to reflect the 2022 Amended Federal Income Tax Return.

## Section III – Parent Personal Statement

Explain in detail why you, the parent(s), were allowed to file using the Head of Household status given your marital status. In addition, if available, please provide IRS supporting documentation or a letter of explanation from your tax preparer.

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I hereby certify that all of the information provided on this form is true, complete, and accurate to the best of my knowledge. I agree to provide information that will verify the accuracy of this completed form. I realize that until all requested information has been submitted, reviewed, and verified, no financial aid will be credited to my student account. **I understand that if corrections need to be made to my FAFSA, the Office of Financial Aid will make the corrections based on the verification process.** If I purposely give false or misleading information, I may be fined, sent to prison, or both. I understand that it may take the Office of Financial Aid a minimum of two weeks to process documents.

\_\_\_\_\_  
Student Signature →**Must be drawn and not typed.**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature →**Must be drawn and not typed.**

\_\_\_\_\_  
Date

Please submit documentation to the Financial Aid office, or through email to [finaid@sage.edu](mailto:finaid@sage.edu)

Albany: Russell Sage College  
Financial Aid Office  
140 New Scotland Ave.  
Albany, NY 12205

Troy: Russell Sage College  
Financial Aid Office  
65 First Street  
Troy, NY 12180