



## 2023-2024 Student Marital Status Worksheet

MSW 24

Student Name: \_\_\_\_\_

Blugold ID: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Dear Student,

The marital status reported on your FAFSA conflicts with your 2021 tax filing status. Please complete the following form to resolve the conflicting information.

1. As of today, what is your marital status? ☐ Married or remarried ☐ Divorced or separated  
☐ Widowed ☐ Never married

Date you were married, remarried, separated, divorced, or widowed \_\_\_\_/\_\_\_\_/\_\_\_\_  
Month Day Year

If married, provide your spouse's name \_\_\_\_\_

2. How many people live in your household?

\*List their names below in the box.

Include:

- yourself, and your spouse if you have one,
- your children, if you will provide more than half of their support between July 1, 2023, and June 30, 2024, even if they do not live with you
- other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support between July 1, 2023, and June 30, 2024.

Full Name	Age	Relationship	Name of College, if attending (7/1/2023 - 6/30/2024)
1		Student	UW-Eau Claire
2			
3			
4			
5			
6			
7			

3. List earnings from 2021. Please review 2021 earnings from wages, salaries, tips, etc., and fill in the amount(s) below for you and your spouse, if applicable. This information may be found on the W-2 forms or on the tax return IRS Form 1040 — line 1 + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A).  
If any individual earning item is negative, do not include it in your calculation.

How much did you earn from working in 2021 \$ \_\_\_\_\_

How much did your spouse earn from working in 2021 \$ \_\_\_\_\_

Complete this form and return it to **Blugold Central Student Services**

**4. If you have become widowed, divorced, or separated since filing your tax return, please complete the following:**

<b>Income for the calendar year 2021</b>	<b>Your Portion only</b>
Wages, salaries, tips	\$ _____
Interest/Dividend Income	\$ _____
Taxable refund	\$ _____
Business income or loss	\$ _____
Capital gain (or Loss)	\$ _____
Rental real estate, royalties, etc.	\$ _____
IRA/Pension Distributions Received	\$ _____
Unemployment compensation	\$ _____

**5. Attach a *signed copy* of your (and if married, your spouse's) 2021 IRS 1040 income tax return, pages 1 and 2, along with schedules 1, 2, and 3 (if filed) OR a copy of your 2021 tax return transcript(s) obtained through the IRS <https://www.irs.gov/individuals/get-transcript> Also, attach IRS **W-2s** from each source of income.**

**6. Student (and if married, spouse's) 2021 Untaxed Income.** Carefully look over the following list of untaxed income sources from 2021 and indicate any amounts received. If any item does not apply, enter zero where an amount is requested.

<b>Sources of Untaxed Income</b>	<b>Student</b>	<b>Spouse</b>
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. <b>Don't include</b> amounts reported in code DD (employer contributions toward employee health benefits).	\$ _____	\$ _____
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS 1040 Schedule 1 – a total of line 16 + Line 20.	\$ _____	\$ _____
Child support <b>received</b> for any of your children. <b>Don't include</b> foster care or adoption payments.	\$ _____	\$ _____
Tax-exempt interest income from IRS Form 1040 – line 2a.	\$ _____	\$ _____
Untaxed portions of IRA distributions and pensions from IRS Form 1040 – (lines 4a+5a) minus (lines 4b+5b). <b>Exclude rollovers.</b> 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). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	\$ _____	\$ _____
Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ _____	\$ _____
Other untaxed income not reported, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13. <b>Don't include</b> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a 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 money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.	_____	_____

## 7. Asset Information (See additional Information below)

List asset information based on the date the FAFSA application was originally filed.

Total balance of cash, savings, and checking accounts: \$ \_\_\_\_\_

Net worth of your (and your spouse's) investments, including real estate: \$ \_\_\_\_\_  
(**Don't include** the home you live in.)

Net worth of your (and your spouse's) current businesses and/or investment farms: \$ \_\_\_\_\_  
(**Don't include** a family farm or business with 100 or fewer full-time or equivalent employees.)

### Certification:

I certify that the information provided above is true and complete to the best of my knowledge.

\_\_\_\_\_  
Student signature (*Wet Signature required*)

\_\_\_\_\_  
Date

**Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

### Assets

An asset is a property the family owns that has an exchange value. The FAFSA collects current (as of the day of signing the FAFSA) data about cash, savings and checking accounts, investments, businesses, and investment farms. Most assets are investments, for example, college savings plans, Coverdell savings accounts, real estate, installment, and land sale contracts (including mortgages held), trust funds, mutual funds, money market funds, UGMA and UTMA accounts, certificates of deposit, stocks, stock options, bonds, commodities, and precious metals. If the asset isn't a business or investment farm, it should be reported as an investment.

### Net Worth

The FAFSA asks for the net worth of investments, which is their total current market value minus their associated debts. If their net worth is negative, the student reports a zero. Similarly, the current net worth for businesses and investment farms is reported for land, buildings, machinery, equipment, livestock, and inventories. The current market value of a business or investment farm is reduced by the debt owed on it to determine the net worth. Business or farm debt means only those debts for which the business or farm was used as collateral.

### Excluded assets—not to be reported on the FAFSA:

- Possessions such as a car, a stereo, clothes, or furniture are not reported as an asset.
- A family's principal place of residence is not reported, even if it is part of a business.
- A family farm (including equipment, livestock, etc.) isn't included as an investment on the FAFSA if:
  - it is the principal place of residence for the applicant and his family (spouse or, for dependent students, parents), and
  - the applicant (or parents of a dependent student) materially participated in the farming operation.
- Family-owned and controlled small businesses (which can include farms) that have 100 or fewer full-time or full-time equivalent employees do not count as an asset. "Family-owned and controlled" means that more than 50% of the business is owned by persons who are directly related or are or were related by marriage (family members do not have to be counted in the household size for this question).
- Retirement plans and whole life insurance. The value of retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) is not counted as an asset, but distributions do count as income—they appear in the AGI if taxable and in question 41 if untaxed. Similarly, the cash value or equity of a whole life insurance policy isn't reported as an asset, but an insurance settlement does count as income.

Complete this form and return it to **Blugold Central Student Services**