



2024-2025 Student Marital Status Worksheet

MSW 25

Student Name: _____ Blugold ID: _____

Phone Number: _____

The marital status reported on your FAFSA conflicts with your 2022 tax filing information. Please complete this form to resolve the conflicting information.

1. As of today, what is your Marital Status? Single (never married) Married (not separated)
 Remarried Divorced Separated Widowed

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

If married, provide your spouse's name _____

Date of Birth _____ and Social Security # _____

2. How many people are in the student's family? *List their names in the box below

Include the student (and spouse), the student's dependent children (even if they live apart due to college enrollment), and other people living with the student now. Include these dependent children and other people only if the student will provide more than half of their support between July 1, 2024, and June 30, 2025.

	Full Name	Age	Relationship
1.			Student
2.			
3.			
4.			
5.			
6.			

If more space is needed, provide a separate page with your name and ID number at the top.

3. Student 2022 Tax Return Information

IRS Form 1040 (or 1040-NR): line 1z + Schedule 1: lines 3 + 6 or refer to your IRS W-2s.

If any individual earning item is negative, do not include it in your calculation.

Student income earned from work in 2022 \$ _____

Spouse's income earned from work in 2022 \$ _____

4. Annual Child Support Received (if applicable) \$ _____

Enter the total amount the student received in child support for the last complete calendar year. If you are "Married" or "Remarried," enter the combined amount the student and their spouse received.

If the answer is zero or the question does not apply, enter 0.

5. If you have become widowed, divorced, or separated since filing your 2022 tax return, please complete the following:

Income from calendar year 2022 Your Portion only

If the answer is zero or the question does not apply, enter 0.

Income Earned from Work (Earned Income)	\$ _____
1040 Line 1z + Schedule 1: lines 3 (Business Income) + line 6 (Farm Income) <i>(if any individual line item is negative, exclude that amount from calculation)</i>	
Untaxed Portions of IRA Distributions and Pensions	\$ _____
IRA, Pension, and Annuity Rollovers	\$ _____
Tax-Exempt Interest Income 1040 Line 2a	\$ _____
Capital gain (or Loss)	\$ _____
IRA Deductions and Payments to Self-Employed SEP, SIMPLE, and Qualified Plans <i>IRS Form 1040 Schedule 1: total of lines 16 + 20</i>	\$ _____
Rental real estate, royalties, etc. Schedule 1, line 5	\$ _____
Unemployment compensation, Schedule 1, line 7	\$ _____
Education Tax Credits	\$ _____

6. Student Asset

If you are “married” or “remarried,” enter the combined amounts held by the student and their spouse. If the answer is zero or the question does not apply, enter 0. The asset information is based on the date the FAFSA application was originally filed.

Current total of cash, savings, and checking accounts. \$ _____
Don't include student financial aid.

Current net worth of investments, including real estate \$ _____
Don't include the home the parent lives in. Net worth is the value of the investments minus any debts owed against them.

Current net worth of businesses and investment farms \$ _____
Enter the net worth of the parent's businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.

7. 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules

Attach a signed copy of your (and if married, your spouse's) 2022 IRS 1040 income tax return, pages 1 and 2, along with schedules 1, 2, and 3 (if filed) OR a copy of your 2022 Tax Return Transcript obtained through the IRS <https://www.irs.gov/individuals/get-transcript> Also, attach IRS **W-2s** from each source of income.

8. Student Signature

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

Student signature (*wet signature required*)

Date signed

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

Assets Guide to Answer Question 6
(no need to submit this page)

University of Wisconsin
Eau Claire



Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and 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, etc.

Investments also include qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the FAFSA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the FAFSA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the FAFSA form, regardless of whether the student is required to report parent information.

Investments do not include the home you live in, the value of life insurance, ABLÉ accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.), or cash, savings, and checking accounts reported in the previous question.

Investments also do not include UGMA/UTMA accounts for which the student is the custodian but not the owner or the value of qualified education benefits or education savings accounts that are for the benefit of the parent's other children (not the student).

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.