

2020-2021
Spousal Information Worksheet

Name: _____ UM ID#: 790- _____

UM E-Mail: _____ Phone#: _____

Spouse's Name: _____ Marital Date: _____ / _____
Month Year

Federal regulation allows students who marry, after filing their FAFSA, to update their marital status from single to married. However, additional information is required to process the corrected FAFSA. This worksheet must be submitted prior to the end of the first semester you are enrolled in the academic year to be considered.

- Do not make any further corrections or changes to your FAFSA regarding your marital status, after submitting this worksheet.

Submit the following required documents to the Financial Aid Office:

1. 2020-2021 Household Verification Worksheet
2. Marriage Certificate
3. Spouse's 2018 Tax Return Transcript (if filed)
4. Spouse's 2018 W-2's (if earned income but did not file taxes)

Spouse's Tax Return Filing Status: (CHECK APPROPRIATE OPTION)

_____ Spouse did not earn income in 2018 and will not file taxes.

Does not need to submit 2018 IRS tax transcript or W-2(s)

_____ Spouse earned income in 2018 but will not file and is not required to file a 2018 federal income tax return.

Spouse's 2018 W-2's must be submitted.

_____ Spouse has or will file a separate 2018 federal income tax return.

If filing taxes a 2018 Tax Transcript of spouse's taxes must be submitted.

_____ Spouse and student have or will file a joint 2018 federal income tax return.

If filing taxes a 2018 Tax Transcript must be submitted.

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Important:

Only consider spouses assets, income and payments when completing the rest of this worksheet. The student's assets, income and payments are already reported on the FAFSA and could impact the student's financial aid eligibility if counted twice.

Spouse's Asset Information: Enter \$0 if any of the following items do not apply.

- A. What is your spouse's total current balance of cash, savings and checking accounts: \$ _____
Do not include student financial aid.
- B. What is the net worth of your spouse's investments, including real estate: \$ _____
Do not include the home you live in. Net worth means current value minus debt.
- C. What is the net worth of your spouse's current business and/or investment farms: \$ _____
Do not include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

Spouse's Additional Financial Information: Enter \$0 if any of the following items do not apply.

- A. Spouse's child support paid: \$ _____
Count only if due to divorce/separation or a result of legal requirement.
Do not count support paid for children in your household.
- B. Spouses taxable earnings from need-based employment programs: \$ _____
Such as Federal Work-Study or need based employment portions of fellowships and assistantships.
- C. Spouse's taxable student grant and scholarship aid reported on taxes in AGI: \$ _____
Include AmeriCorps benefits as well as grant and scholarship portions of fellowships and assistantships.
- D. Spouse's combat pay or special combat pay reported on taxes in AGI: \$ _____
Only include taxable amount, do not include untaxed combat pay.

Spouse's Untaxed Income: Enter \$0 if any of the following items do not apply.

- A. Spouse's payments to tax-deferred pension and savings plans: \$ _____
Include amounts reported on spouse's w-2 forms in boxes 12a through 12d, codes D, E, F, G, H and S.
- B. Child support received by spouse for any children in household: \$ _____
Do not include foster care or adoption payments.
- C. Housing, food and other living allowances: \$ _____
Only count if paid to members of military, clergy etc.
Do not include the value of on-base military housing or the value of a basic military allowance for housing.
- D. Money received, or paid on your behalf not previously reported: \$ _____

Signature:

By signing this worksheet you are certifying that the information reported is complete and correct.

Student Signature

Date

Spouse Signature

Date