

**2025-2026**  
**Spousal Information Worksheet**

Student Name: \_\_\_\_\_ UM ID#: \_\_\_\_\_

Spouse 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.

**IMPORTANT:** If approved, our office will make the changes on your behalf. Do not make any further corrections or changes to your FAFSA regarding your marital status, after submitting this worksheet. If you are changed to married but then separate or divorce, your status could revert back to dependent if no other independent status criteria met.

**Complete this form and submit the following required documents to the Financial Aid Office:**

1. Marriage Certificate
2. Spouse - 2023 IRS Tax Return Transcript (if filed) or Spouse - 2023 Foreign Income Tax Return (if applicable) Transcripts can be downloaded from [www.irs.gov/transcripts](http://www.irs.gov/transcripts).
3. Spouse - 2023 W-2(s) or Wage and Income Transcript (if earned income but did not file taxes)

**ADDITIONAL QUESTIONS:**

**1) Family Size:** How many people are in the student's family \_\_\_\_\_  
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, 2025 and June 30, 2026.

**2) Child Support Received:** Annual Child Support Received: \$ \_\_\_\_\_  
Enter total amount the spouse received in child support for the last complete calendar year. Do not combine with previous answer on FAFSA; only include amount spouse received.

**3) IRA or Pension Rollover:** If your spouse filed taxes in 2023, was there a ROLLOVER of an IRA or Pension in 2023? \_\_\_\_\_  
No or \_\_\_\_\_ Yes, \$ \_\_\_\_\_

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**4) Spouse's 2023 Tax Filing Status (check one):**

\_\_\_\_\_ Spouse did not work in 2023 and did not file federal income taxes.

\_\_\_\_\_ Spouse earned income in 2023 but will not file and is not required to file a 2023 federal income tax return. Submit all 2023 W2(s) or Wage and Income Transcript. (List all wages regardless of where earned (US and/or foreign income.)

*List: Employer and amount of 2023 Wages*

\_\_\_\_\_

\_\_\_\_\_ Spouse filed or will file a 2023 federal income tax return.

If your spouse filed 2023 taxes, submit a signed copy of their 2023 federal tax return and all applicable schedules or their 2023 IRS Tax Transcript ([www.irs.gov/transcript](http://www.irs.gov/transcript)) or if your spouse filed a foreign tax return in 2023, submit a signed copy of the foreign tax return.

**Important:** In this section, only consider spouse's 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.

**5) 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: \$ \_\_\_\_\_

Don't include the home the student lives in. Net worth is the value of the investments minus any debts owed against them..

**C.** What is the net worth of your spouse's current business and/or investment farms: \$ \_\_\_\_\_

Enter the net worth of the student's businesses or for profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.

Enter total amount the student received in child support for the last complete calendar year. If the answer is zero or the question does not apply, enter 0. \$ \_\_\_\_\_

**Signatures:**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date