

Student's Name _____
Last First MI

Student ID #: _____

Please read all instructions carefully. Inaccurate or incomplete information may delay the processing of your financial aid file. Forms not complete in their entirety will not be accepted.

IRS regulations require you to file taxes utilizing the correct filing status. Based on your (or your parent's) marital status answer given on your Free Application for Federal Student Aid (FAFSA), there may be a conflict with the tax filing status as reported on your (or your parent's) tax return submitted to the IRS.

FILING STATUSES:

- **Single:** You are unmarried or considered unmarried as of the last day of the tax year, and do not qualify for another filing status (see IRS Publication 17 to determine if you meet the test of "considered unmarried")
- **Head of Household:** You are unmarried or **considered unmarried** as of the last day of the tax year, have a qualifying dependent, you paid more than half the cost of keeping up your home for the tax year (see IRS Publication 17 to determine if you meet the test of "considered unmarried")
- **Married Filing Jointly:** You are considered married and both you and your spouse agree to file a joint return
- **Married Filing Separately:** You (or your parents) are married and choose to file your (or your parents) taxes separately – note, you will need to provide both tax transcripts if both parents are listed on the FAFSA
- **Qualifying Widow(er) with Dependent Child:** You were entitled to file a joint return the year your spouse died, your spouse died in 2013 or 2014 and you did not remarry in 2015, have a child you can claim as an exemption and who lived at home all year and you paid more than half of the cost of keeping up your home for the year

Considered Married: For the purposes of tax filing status determination, you are considered married for the whole year if, on the last day of your tax year, you and your spouse meet **any** one of the following tests.

1. You are married and living together as a married couple.
2. You are living together in a common law marriage recognized in the state where you now live or in the state where the common law marriage began.
3. You are married and living apart, but not legally separated under a decree of divorce or separate maintenance.
4. You are separated under an interlocutory (not final) decree of divorce.

In order to resolve the conflicting information, please review your FAFSA application.

Choose the statement below that applies to your situation and provide the applicable documentation.

- If you reported the tax filing status in error, an adjustment should be made to question 34 if you are the student, and/or question 82 if you are the parent of a dependent student. If you would like CPCC's Financial Aid Office to make the correction, please also provide signed copies of the appropriate 2015 tax forms or the IRS Tax Return Transcript(s).
- If the answer is accurate on your FAFSA, and the tax return is incorrect, you will need to file an amended tax return. Once filed with the IRS, you will need to provide CPCC's Financial Aid Office a **signed** copy of the 2015 amended IRS Tax Return (IRS form 1040X) AND the 2015 IRS Tax Return Transcript. Also complete the 1718 Verification of Amended IRS Tax Return Form.
- If your tax preparer or the IRS determines that your tax filing status is accurate, please provide documentation (on company letterhead) from your tax preparer or the IRS stating that you filed correctly.

By signing this worksheet, I (we) certify that all of the information reported to qualify for Federal student aid is complete and correct (If dependent, at least one parent must sign).

Student signature_____
Date_____
Parent signature (required if the student is dependent)_____
Date

Warning: According to the U.S. Department of Education, if you purposely give false or misleading information on form, you may be subject to a fine of up to \$20,000 or imprisonment for up to 5 years, or both.

You may submit your documents in person to any of our six locations or mail them to:

Financial Aid/Veteran's Affairs – Central Piedmont Community College – PO Box 35009 – Charlotte, NC 28235-5009

Telephone: (704) 330-6942