

Marital Status / Tax Mismatch (2025–26)

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

Student Information (Please Print)

Last Name: First Name:

Middle Initial: Student ID Number:

Student Email Address:

Street Address
(Include Apartment Number):

City: State: Zip Code:

Phone Number (Include Area Code):

Instructions

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 tax 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 contributor's) tax return submitted to the IRS.

Section 1: Marital and Tax Filing Status

Marital Status

What is your (or if a dependent student, your contributor's) Marital Status as of the date you completed the FAFSA?

☐ Single

☐ Married or
Remarried
Date of Marriage:

(MM/YYYY)

☐ Divorced
Date of Divorce:

(MM/YYYY)

☐ Separated Date of Separation: (MM/YYYY)	☐ Widowed Date Widowed: (MM/YYYY)	☐ Unmarried but Living Together
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Tax Filing Status

Indicate your (your spouse, or your contributor's) Tax Filing Status on the 2023 Federal Tax Return.

A. Student (Independent Student)

☐ Single	☐ Married Filing Separately	☐ Married Filing Jointly
☐ Head of Household	☐ Qualifying Widower	☐ Did Not File

B. Spouse (Independent Student, if married)

☐ Single	☐ Married Filing Separately	☐ Married Filing Jointly
☐ Head of Household	☐ Qualifying Widower	☐ Did Not File

C. Contributor 1 (Dependent Student)

- | | | |
|--|--|---|
| ☐ Single | ☐ Married Filing Separately | ☐ Married Filing Jointly |
| ☐ Head of Household | ☐ Qualifying Widower | ☐ Did Not File |

D. Contributor 2 (Dependent Student, if applicable)

- | | | |
|--|--|---|
| ☐ Single | ☐ Married Filing Separately | ☐ Married Filing Jointly |
| ☐ Head of Household | ☐ Qualifying Widower | ☐ Did Not File |

Section 2: Explanation of Tax Filing Status

Please explain why you were allowed to use the tax filing status given your marital status. Please provide a letter of explanation from your tax preparer on signed letterhead or IRS, if available. Visit [IRS publications](#) for information on federal tax filing requirements.

Section 3: Head of Household Eligibility

Complete Section 3 if you (or your contributor) are married or remarried and you (or spouse, or contributor) filed as Head of Household.

Per **IRS Publication 501**, the Head of Household status is for **unmarried individuals** who provide more than 50% of the cost for keeping up a home and have a qualifying dependent.

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.

Head of Household Requirements

Complete this section if you were eligible to file head of household. By selecting each requirement, you are certifying that you meet this requirement.

- ☐ You are unmarried or considered unmarried on the last day of the year
- ☐ You paid more than half the cost of keeping up a home for the year
- ☐ You supported a qualifying person lived who with you in the home for more than half the year

If you do not meet **all** of the listed requirements for Head of Household status, an amended tax return (1040X) may be required to correct your (or your contributor's or spouse's) tax filing status with the IRS.

Please submit a **signed** copy of the 2023 amended tax return that you have submitted to the IRS along

with your 2023 IRS Tax Return Transcript to the Financial Aid office.

Certification and Signature

Please provide your signature. If you are a dependent student, please also provide one contributor's signature whose information is listed on your FAFSA. By providing signature(s), you are certifying that all of the information on this form is complete and correct. You are also authorizing Central Piedmont Community College to make corrections to your original and/or subsequent applications based on the documents you are now submitting.

Student Signature: _____ Date: _____

Contributor Signature
(Dependent Students Only): _____

Date: _____