



2021-2022 Special Circumstances - Marriage – (F22MAR)

Student Name _____ Student ID _____ Phone #: _____

Students may update their marital status after their FAFSA has been filed. UMSL has the discretion to accept the updated marital status if we deem it necessary to address an inequity or to reflect more accurately the applicant's ability to pay for college. Marital status changes will be reviewed and decisions will be made on a case-by-case basis.

All required tax forms submitted must be signed and dated by the individual(s) taxpayer on the tax return.

Please attach the following documents to this form:

- Copy of your Marriage License
- Copies of you *and* your spouse's 2019 W-2's
- Copies of you *and* your spouse's 2019 Tax Return Transcript **OR** 2019 Tax Return (1040 Form) *and* applicable IRS Schedules 1, 2, and/or 3

Assets (Spouse Only)

The student's income information is already on the FAFSA, now we need the same information for the spouse:

Amounts listed should reflect the amount at the time the FAFSA was completed.

The balance of cash, savings and checking accounts DON'T INCLUDE: student financial aid	\$
The net worth of your investments, including real estate funds, UGMA and UTMA accounts, money market funds, mutual funds, stocks, bonds, etc. DON'T INCLUDE: the home in which you live, value of life insurance, retirement plans (401k's, pensions) or cash, savings, and checking account already reported	\$
The net worth of your current businesses and/or investment farms including the market value of land, buildings, machinery, equipment, inventory, etc. DON'T INCLUDE: family farm that you (your spouse and/or parents) live on or family business with 100 or fewer fulltime employees	\$

2019 Income Worksheet

Instructions: Your information is already on your FAFSA so now we just need your spouse's. Answer all questions below, listing the amount for each. If zero, enter "0".

A. INCOME SUBJECT TO TAX for 2019	SPOUSE
1. Wages, Salaries, tips, etc. Report using same guidelines as would be used on your tax return: IRS Form 1040—line 1 + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A)	\$
2. Interest Income	\$
3. Unemployment compensation, severance package, life insurance income	\$
4. Dividends	\$
5. Other taxable income (alimony received, business and farm income capital gains, pensions, annuities, rents, Social Security, Railroad Retirement, and all other taxable income)	\$
6. IRS-allowable adjustments to income (payments to IRA and Keogh Plans, one half of self-employment tax, self-employed health insurance deduction, interest penalty on early withdrawal of savings, and alimony paid)	\$

