2018-2019 Parents’ Marital Status Worksheet

Student Name: _____________________________________________  Blugold ID: ____________________________

Dear Parent(s):

We have received your student’s financial aid application, but unfortunately – additional information is required to determine their financial aid award. The processing of your student’s aid application is on hold until this information is received. If you have any questions, feel free to contact us at (715) 836-3000 or email us at blugoldcentral@uwec.edu.

1. Please indicate your date of marriage (or separation/divorce): _______ / ____ / ____  
   [ ] Married or remarried  [ ] Single  [ ] Divorced or separated  [ ] Widowed  
   If married, please list spouse’s Name_______________________________________________  
   Date of Birth ___________________ and Social Security # _________________________

2. How many people live in your household?    *  
   *List their names below in the box.  
   Include:  
   • yourself, and your spouse if you have one,  
   • your children, if you will provide more than half of their support between July 1, 2018 and June 30, 2019, even if they do not live with you,  
   • other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support between July 1, 2018 and June 30, 2019.

<table>
<thead>
<tr>
<th>*Full Name of All Household Members</th>
<th>Age</th>
<th>Relationship</th>
<th>College, if attending (7/1/2018-6/30/2019)</th>
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3. Please review the earnings from wages, salaries, and tips and fill in the correct amount(s) below for the biological parent listed on the FAFSA and current spouse.

This information may be found on:

• Your W-2 Forms, Box 1; OR
• IRS Form 1040 Lines 7+12+18+Box 14 of Schedule K-1(Form 1065); OR
• IRS Form 1040A Line 7; OR
• IRS Form 1040EZ, Line 1

(step) Father’s Income earned from wages, salaries, tips, etc. in 2016 ____________________________

(step) Mother’s Income earned from wages, salaries, tips, etc. in 2016 + ____________________________

Total earned income reported on taxes = ____________________________
4. If you have become widowed, divorced, or separated since filing your tax return, please complete the following:

Income for calendar year 2016  Your Portion only
Wages, salaries, tips $____________
Interest/Dividend Income $____________
Taxable refund (line 10 of taxes) $____________
Business income or loss $____________
Capital gain (or Loss) $____________
Rental real estate, royalties, etc. $____________
IRA/Pension Distributions Received $____________
Unemployment compensation $____________

5. Attach a copy of your 2016 IRS Tax Return Transcript when submitting this form. An IRS Tax Return Transcript may be obtained through:
   - Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click “Get a tax transcript.” Click “Get Transcript by MAIL’ Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript”
   - Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading click “Get a Tax transcript.” Click “Get Transcript ONLINE.” Make sure to request the ‘IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript”
   - Automated Telephone Request  – 1-800-908-9946
   - Paper Request Form – IRS Form 4506-T

6. Carefully look over the following list of untaxed income sources for 2016 and indicate any amounts received. If any item does not apply, enter zero where an amount is requested.

<table>
<thead>
<tr>
<th>Sources of Untaxed Income</th>
<th>Student</th>
<th>Parent(s)</th>
</tr>
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<tbody>
<tr>
<td>List Payments to tax-deferred pension and retirement savings (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.</td>
<td>$</td>
<td>$</td>
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<tr>
<td>Child support received in 2016 for the children in your house.</td>
<td>$</td>
<td>$</td>
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<td>Housing, food, and other living allowances paid to members of the military, clergy, and others. Include cash payments and/or the cash value of benefits received. Do not include the value of on-base military housing or the value of a basic military allowance for housing.</td>
<td>$</td>
<td>$</td>
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<td>Veterans non-education benefits received in 2016 Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. Do not include federal veterans educational benefits such as: Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill</td>
<td>$</td>
<td>$</td>
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<tr>
<td>Other untaxed income not reported and not excluded elsewhere on this form. Include untaxed income such as workers’ compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. Do not include student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.</td>
<td>$</td>
<td>$</td>
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<tr>
<td>Money received or paid on the student’s behalf (e.g., payment of student’s bills) and not reported elsewhere on this form. Include support from a parent whose information was not reported on the student’s 2018–2019 FAFSA. Also include any distributions to the student from a 529 plan owned by someone other than the student or the student’s parents, such as grandparents, aunts, and uncles of the student.</td>
<td>$</td>
<td>$</td>
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</tbody>
</table>
Asset Information (See additional Information below)
List asset information based on the date the FAFSA application was originally filed.

Total Balance of Cash, savings, and checking accounts $_______

Net worth of real estate and investments (value-debt = net worth) $_______
(Don't include the home you live in, the value of life insurance or retirement plans)

Net worth of Business and or Farm (value-debt = net worth) $_______
(Don't include a family farm if it is the principal place of residence, or a business if it has 100 or less full time employees.)

Certification:
I certify that the information provided above is true and complete to the best of my knowledge.

Date: __________________________
Parent signature

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Assets
An asset is property the family owns and that has an exchange value. The FAFSA collects current (as of the day of signing the FAFSA) data about cash, savings and checking accounts, investments, businesses, and investment farms. Most assets are investments, for example, college savings plans, Coverdell savings accounts, real estate, installment and land sale contracts (including mortgages held), trust funds, mutual funds, money market funds, UGMA and UTMA accounts, certificates of deposit, stocks, stock options, bonds, commodities, and precious metals. If the asset isn't a business or investment farm, it should be reported as an investment.

Net Worth
The FAFSA asks for the net worth of investments, which is their total current market value minus their associated debts. If their net worth is negative, the student reports a zero. Similarly for businesses and investment farms, the current net worth is reported for land, buildings, machinery, equipment, livestock, and inventories. The current market value of a business or investment farm is reduced by the debt owed on it to determine the net worth. Business or farm debt means only those debts for which the business or farm was used as collateral.

Excluded assets—not to be reported on the FAFSA:
→ Possessions such as a car, a stereo, clothes, or furniture are not reported as an asset.
→ A family's principal place of residence is not reported, even if it is part of a business.
→ A family farm (including equipment, livestock, etc.) isn't included as an investment on the FAFSA if:
   • it is the principal place of residence for the applicant and his family (spouse or, for dependent students, parents), and
   • the applicant (or parents of a dependent student) materially participated in the farming operation.
→ Family-owned and controlled small businesses (which can include farms) that have 100 or fewer full-time or full-time equivalent employees do not count as an asset. “Family-owned and controlled” means that more than 50% of the business is owned by persons who are directly related or are or were related by marriage (family members do not have to be counted in the household size for this question).
→ Retirement plans and whole life insurance. The value of retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) is not counted as an asset, but distributions do count as income—they appear in the AGI if taxable and in questions 44 and 92 if untaxed. Similarly, the cash value or equity of a whole life insurance policy isn't reported as an asset, but an insurance settlement does count as income.

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