



Head of Household 2014-2015

Student's Name: \_\_\_\_\_

SU ID: \_\_\_\_\_

It appears that one or both parents filed as Head of Household on their 2013 IRS Tax Transcript. In order for us to continue processing your financial aid, we must file an amended tax return (1040X) that shows Married Filing Separate, Married Filing Joint or a statement from your licensed tax professional, that clearly states the reason they were eligible to file as Head of Household. If the tax return in question was self-prepared, you must provide a statement from a CPA or licensed tax professional that clearly states the reason they were eligible to file as Head of Household. Please refer to the IRS guidelines below for filing Head of Household.

You may be able to file as Head of Household if you meet ALL the following requirements.

- 1. You are unmarried or "considered unmarried" on the last day of the year.

You are considered unmarried on the last day of the tax year if you meet ALL the following tests.

- 1. You file a separate return.
2. You paid more than half the cost of keeping up your home for the tax year.
3. Your spouse did not live in your home during the last 6 months of the tax year. Your spouse is considered to live in your home even if he or she is temporarily absent due to special circumstances.
4. Your home was the main home of your child, stepchild, or foster child for more than half the year.
5. You must be able to claim an exemption for the child. However, you meet this test if you cannot claim the exemption only because the noncustodial parent can claim the child.
2. A "qualifying person" lived with you in the home for more than half the year (except for temporary absences, such as school). However, if the "qualifying person" is your dependent parent, he or she does not have to live with you.

For more information regarding filing as Head of Household, see IRS Publication 501.

Return this form with the following information:

- \_\_\_\_\_ An IRS Tax Return Transcript, an IRS Account Transcript (Go to IRS Web site at: www.irs.gov/Individuals/Get-Transcript) and a copy of the 1040X if your parents, OR
\_\_\_\_\_ A letter from a CPA or licensed tax professional stating the reason why they were eligible to file as Head of Household.

If you purposely give false information on this worksheet, you may receive a fine, a prison sentence, or both.

By signing this information request, I certify that all information is complete and correct. We must have the signature of both parents.

Parent's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Parent's Signature: \_\_\_\_\_

Date: \_\_\_\_\_