



2023-2024 Student and Spouse Head of Household Form

Please complete in blue or black ink.

Student Name (Please Print)

Student ECU (Banner) ID

According to the information you provided: You and your spouse filed your 2021 IRS income tax return as “Head of Household” and you appear to have been married in 2021. Please follow the **Student and Spouse Instructions listed below.**

Please review these **rules** from **IRS Publication #501** to determine who can file a 2021 IRS form as “Head of Household.”

You may be able to file as “head of household” if you meet ALL the following requirements:

1. You were separated or divorced on the last day of the year.
2. You paid more than half the cost of keeping up a home for the year.
3. **A *qualifying person lived with you in the home for more than half the year (except for temporary absences such as attending school).**

***A qualifying person is:**

1. your child or grandchild who lived with you more than half the year and is single or is married but still someone you can claim as an exemption or
2. the tax filer’s mother or father, if the taxpayer claims the mother/father as an exemption or
3. another relative who lives with the taxpayer more than half the year **and** the taxpayer claims the relative as an exemption

You are considered separated/divorced if you meet the following requirement:

1. Your spouse did not live in your home during the last 6 months of the tax year.

Student and Spouse Instructions:

If you and your spouse should not have filed your 2021 income tax returns as “Head of Household”:

1. File an amended 2021 IRS income tax return.
2. Submit both of the following to our office:
 - a. A **2021 IRS Tax Return Transcript** (signature not required) **OR** a **signed copy of the 2021 Income Tax Return and All Schedules completed; AND**
 - b. A **signed copy of the 2021 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,”** that was filed with the IRS.

If you and your spouse meet the conditions for filing a 2021 IRS income tax return as “Head of Household”:

1. Provide the requested information below.
2. Return this signed form to our office.
3. Both the student and spouse must sign this form.

	Student Information	Spouse Information
Please provide the address where you and/or your spouse lived for the last 6 months of 2021. Include the street, apartment number, city, state, zip code. Post Office Boxes are not acceptable addresses for this purpose.		

Were you married as of December 31, 2021 – or were you considered separated/divorced as of December 31, 2021	____ MARRIED ____ SEPARATED ____ DIVORCED	____ MARRIED ____ SEPARATED ____ DIVORCED
Did you and/or your spouse pay for more than half the cost of keeping up a home for 2021?	____ YES ____ NO	____ YES ____ NO
Did a qualifying person live with you and/or your spouse in either home for more than half of 2021? If so, please provide the person's name and relationship to the parent.	____ YES ____ NO Name: _____ Relationship to You: _____	____ YES ____ NO Name: _____ Relationship to You: _____

The information provided on this form is, to the best of our knowledge, correct and accurate.

Student Signature

Date

Spouse Signature

Date

Due to Federal Privacy Regulations regarding email and the protection of your personal information, we urge you to send documents to our secure FAX at 252-328-4347 or mail all documents to Office of Student Financial Aid, MS510, East Carolina University, Greenville, NC 27858. For materials that may contain a social security number, please cover or remove all but the last four digits. For materials with the date of birth, please cover or remove the year. If you have any questions, please contact our office at 252-328-6610.