



# 2020-2021 Determining Your IRS Filing Status

Please use black or blue ink while filling out this form.

Student Name

LMU ID

**Instructions: Please answer all questions below which will be used to determine your filing status according to IRS requirements.** Your filing status is used to determine your filing requirements, standard deduction, eligibility for certain credits, and your correct tax.

**Check one:**  Completed by Parent of the student listed above  Completed by the Student (Independent)

**Information You Will Need:**

1. Citizenship status, marital status, spouse's year of death (if applicable)
2. The percentage of the costs that your household members paid towards keeping up a home

## Section I

The following set of questions will help us determine your filing status.

1. What [tax year](#) are you asking about?  2019  2018  2017

2. What was your marital status on the last day of the tax year?

3. Do you and your spouse intend to file a joint tax return for the tax year?  Yes  No

4. Did you provide more than [half of your own support](#) for the tax year?  Yes  No

5. Did you pay more than half the cost of [keeping up a home](#) for the tax year?  Yes  No

6. What was your age on the last day of the tax year?

7. Did any taxpayer individually provide more than half of your support during the tax year?  Yes  No

8. What is your relationship to the person who provided your support?

9. Including [temporary absences](#), did you live with them for more than half of the tax year?  Yes  No

10. Is the person who provided the [support](#) and with whom you lived with for more than half of the tax year, older than you?

Yes  No

11. Were you permanently and totally disabled during the tax year?  Yes  No

12. Did your spouse live in your home at any time during the last six months of the tax year (including any temporary absences)?  Yes  No

13. Did your spouse die during 2018 or 2019?  Yes  No

14. Were you entitled to file a joint tax return with your spouse for the year your spouse died?  Yes  No

15. Were you a full-time student during five or more months during the tax year?  Yes  No



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## Section II

Please provide first names (or other identifiers) for everyone:

1. Who lived with you during the tax year, or
2. Who is your child, or
3. For whom you provided any financial support during the tax year.
4. Use another sheet of paper should you need additional space.

Name	Relationship to you	Date of birth	Did this person provide more than half of his or her own support for the tax year?	Marital Status	Was this person single as of the last day of the tax year?	Can someone else claim this person as a dependent?	Is this person's other legal parent (as determined by state law) still alive?	In what state was this person's primary residence located during
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## Section III

15. Did any of the people listed above live with you for more than half of the tax year (including any temporary absences)?

**Note:** A person is considered to have lived with you during periods of time when one or both of you are temporarily absent due to special circumstances such as: (1) Illness, (2) Education, (3) Business, (4) Vacation, or (5) Military service.  Yes  No

**Note:** It must be reasonable to assume that the absent person will return to the home after the temporary absence.

16. Were you ever married to any of the above person's other parent?  Yes  No

17. Were you legally separated from any of the above person's other parent under a decree of divorce or separate maintenance?  Yes  No

18. Were you separated from any of the above person's other parent under a written separation agreement?  Yes  No

19. As of July 2, 2018, had any person listed above been granted majority status by means other than age?  Yes  No

**Note:** Factors other than age can influence majority status. For example, if a minor is declared emancipated by a judge, they usually receive majority status at the same time. Majority status may also be granted to minors who marry or who join the armed forces.

20. During the tax year, did any person listed above spend more nights in your home than he or she did with his or her other parent?  Yes  No

## Section IV

### Certification and Signatures:

Each person signing below certifies that all of the information required is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student Signature \_\_\_\_\_

Date

Parent Signature \_\_\_\_\_

Date

### How to Submit this Form:

The Department of Education requires that documents containing personally identifiable information (PII) must be transmitted through secure means. This form cannot be submitted via email. You may mail or fax this form to the address or fax number listed to the left, or you may submit it as a PDF through our Secure Upload page available at [financialaid.lmu.edu/upload](http://financialaid.lmu.edu/upload)

**Mail:** LMU Financial Aid Office  
1 LMU Drive, Suite 270  
Los Angeles, CA 90045

**Phone:** 310.338.2753  
**Fax:** 310.338.2793

For Office Use Only:  
RRAAREQ - HEAD at C  
Etrieve - Head of Household  
FAO Staff Initial \_\_\_\_\_  
Date: \_\_\_\_\_