



2021-2022

Petition for Marital/Dependency Status Change

Federal Regulations

Beginning July 1, 2012, the Department of Education provides that an institution may, at its discretion, update a student's marital status, even if the update will result in a change in the applicant's dependency status if the institution determines the update is necessary to address an inequity or to reflect more accurately the applicant's ability to pay.

Instructions

If you believe you may qualify for a dependency status change due to marriage, **please submit your petition by January 31st, 2022**. Any marriage that has taken place, or application submitted after the required date will not be considered for a dependency status change until the following aid year.

Verification

Any student petitioning for change in dependency status due to marriage will be selected for verification, regardless if he/she completed verification as a dependent, and will have to submit the following:

- Official Marriage License
- Independent Verification Worksheet
- Student and Spouse Tax Return Transcript (if applicable)
- Student and Spouse W-2 forms (if applicable)

Student Information

PLEASE PRINT

Student's Name: _____ ID#: _____

Student's Email: _____

Student's Cell Phone: _____ Work Phone: _____

Street Address: _____

City: _____ State: _____ Zip: _____

1. Filed Taxes in 2020? (circle one): Y N
 - If no, do you have W-2 income? Y N (Attach W-2's)
2. Do you and your spouse live with your parent's or spouse's parents? Y N

Marriage Date: _____ State, Province or Region on License: _____

Spouse Information

Spouse's Name: _____

Spouse's Email: _____

Spouse's Phone: _____

Spouse's Street Address (if different than students): _____

City: _____ State: _____ Zip: _____

1. Filed Taxes in 2020? (circle one): Y N
 - If no, do you have W-2 income? Y N (Attach W-2's)
2. As of today, what is your spouse's total current balance in cash, savings, and checking accounts?
\$ _____
3. As of today, what is the net worth of your spouse's investments, including real estate (not including the home you live in)? *Net worth means* current value minus debt \$ _____
4. As of today, what is the net worth of your spouse's business and/or investment farms?
Do not include a farm that you live on and operate \$ _____
5. Child support paid because of divorce or separation or as a result of a legal requirement.
Do not include support for children in your household \$ _____

a. Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 28 + 32.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
c. Child support received for any of your parents' children. Don't include foster care or adoption payments.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
d. Tax exempt interest income from IRS Form 1040—line 2a.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
e. Untaxed portions of IRA distributions and pensions from IRS Form 1040—line 4a minus line 4b. Exclude rollovers. If negative, enter a zero here.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
f. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
g. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										
h. Other untaxed income not reported in items 92a through 92g, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$ <table border="1" style="width: 100%; height: 20px;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>										

PLEASE NOTE: Petitions will only be considered "complete" after receiving all the necessary corresponding documentation, and will not be processed without it. The approval or denial of any petition is at the discretion of Perry Technical Institute Financial Aid Office and cannot be appealed.

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Student Signature	Spouse Signature	Date

Please return to Perry Technical Institute, Financial Aid Office
2011 W Washington Ave Yakima WA 98903 • fax 509.453.0458 • financialaid@perrytech.edu

Revised 10/2020