

**Brody School of Medicine
Office of Student Affairs/Financial Aid**

2009-2010 Student and Spouse Head of Household Form

According to the information you provided: You and your spouse filed your 2008 federal income tax return as “head of household” and you appear to have been married in 2008. Please follow the **Student and Spouse Instructions listed below.**

Please review these **rules** from **IRS Publication #501** to determine who can file a 2008 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 tax payer claims the mother/father as an exemption or
3. another relative who lives with the tax payer and the tax payer 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 2008 income tax returns as “head of household”:

1. File an amended 2008 federal income tax return.
2. Submit a signed copy of the amended 2008 federal income tax return to our office.

If you and your spouse meet the conditions for filing a 2008 federal income tax return as “head of household”:

1. Provide the requested information below.
2. Return this signed form to our office.
3. 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 2008. 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, 2008 – or were you considered separated/divorced as of December 31, 2008	Choose One <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED <input type="checkbox"/> DIVORCED	Choose One <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED <input type="checkbox"/> DIVORCED
Did you and/or your spouse pay for more than half the cost of keeping up a home for 2008?	Choose One <input type="checkbox"/> YES <input type="checkbox"/> NO	Choose One <input type="checkbox"/> YES <input type="checkbox"/> NO

Did a qualifying person live with you and/or your spouse in either home for more than half of 2008? If so, please provide the person's name and relationship to the parent.	Choose One ___ YES ___ NO Name: _____ Relationship to You: _____	Choose One ___ YES ___ NO Name: _____ Relationship to You: _____
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 Student Last Name, First Name, Middle Name
 (PLEASE PRINT)

 Student ECU (Banner) ID

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

 Student Signature

 Date

 Spouse Signature

 Date

Please complete and return this form along with all documents via mail to: Brody School of Medicine, Office of Student Affairs/Financial Aid, Brody 2S-20, Mail Stop 613, Greenville, NC 27834 or fax to 252-744-3250 or send a copy via email to bsomstudentaffairs@ecu.edu. If you have any questions, please contact our office at 252-744-2278.