



Nondebtor Spouse Claim And Allocation for Refund Due

Important: Read the instructions below before completing this form to be sure you are eligible to file. Retroactive refunds for past tax years will not be approved. Please print. Names and address should appear as they did on the joint return.

Your first name and initial	Last name	Last 4 Digits Social Security #	Nondebtor Spouse? Circle YES / NO
Spouse's first name and initial	Last Name	Last 4 Digits Social Security #	Nondebtor Spouse? Circle YES / NO
Street Address	Apartment Number	City/Town/Post Office	State/Zip
Address if different from above	Email(s)	Work Phone Number(s)	Home/Cell Number(s)

Allocation Items	A. Nondebtor Spouse	B. Other Spouse	C. Joint (as filed) (A) + (B)
1. Total Income (List all sources here)			
2. Adjustments to income			
3. Deductions			
4. Exemptions			
5. Credits against tax (do not include Limited Income Credit)			
6. Taxes withheld (include copies of all W-2 forms)			
7. Tax payments (amounts paid with return, estimated, etc.)			

Under penalties of perjury, I declare that I have examined this form, and to the best of my knowledge it is true, correct and complete. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has knowledge.

Signature of nondebtor spouse	Date
Signature of paid preparer	Date
Paid preparer use only: Self-employed? Circle YES / NO	Tax ID#

Are You Eligible to File this Form?

You may file this form if:

- You filed a joint Massachusetts tax return with and overpayment applied against the past due income tax debt of your spouse.
- You are filing this claim within 90 days of the State Income Tax Refund Intercept Transfer notice.
- You have submitted a copy of your marriage certificate

You may not file this form if:

- Your certificate of marriage date predates the date that the debt was incurred at the University of Massachusetts.
- You failed to provide W-2 form for both parties, Summary Tax Forms and Marriage Certificate.

How does my spouse remove their name from future Commonwealth Tax seizures?

- Borrowers can remove themselves from future tax seizures by establishing a repayment plan or rehabilitation agreement. Call UMass at 413-545-2377 for details.

Mail forms to: **UMass Receivables Office, 215 Whitmore Administration Building, 181 Presidents Drive, Amherst, MA 01003-9313**

Questions can be directed to:

PerkLoan@admin.umass.edu

413-545-2377