

# W&M FINANCIAL AID

## 2025 - 2026 Independent Student Verification Worksheet

Student Name: \_\_\_\_\_ Student ID Number: \_\_\_\_\_

Verification allows William & Mary to ensure the information you reported on your FAFSA to is accurate. Discrepancies between the FAFSA and the supporting documentation may result in revised financial aid eligibility.

### A. Family Size

Family Size – Includes the following:

- The student
- The student's spouse, if applicable
- The student’s dependent children if the following are true:
  - They live with the student (or live apart due to college enrollment);
  - They receive more than half of their support from the student; and
  - They will continue to receive more than 50.1% of their support from the student during the award year - August 2025 through August 2026
- Other persons if the following are true:
  - They live with the student.
  - They receive more than half of their support from the student.
  - They will continue to receive more than 50.1% of their support from the student during the award year - August 2025 through August 2026

Criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2025 – 2026 FAFSA. As a result, do not include any unborn children in the family size.

*(Attach a separate page with the student’s name and W&M ID number at the top if you need more space).*

Full Name	Age	Relationship
		Self/Student

### B. Student Tax Forms and Income Information

Please certify which statements are accurate and provide the documentation applicable to your responses.

- Student is married and file their taxes separately (Married filing joint, head of household, single, etc.)  
*(provide 1040 signed tax returns for each parent in the household)*
- Student has filed an amendment to their 2023 tax return. *(provide 1040X signed)*
- Student has had a change in marital status since after December 31, 2023. *(review the Special Circumstances appeal form to determine if an appeal should be filed)*

## Student Tax Information

- I was not required to file a 2023 Federal Tax Return and will provide:
- IRS Verification of Non-Filing **AND**
  - W&M Verification of Non Filing Statement
- I filed a 2023 Federal Tax Return and used the IRS Direct Data Exchange and will provide:
- All W2's, 1099's, all Schedules, K-1's and/or any other documentation to confirm wages.
- I filed a 2023 Federal Tax Return but am ineligible to use the IRS Direct Data Exchange and will provide:
- 2023 tax transcript
  - All W2's, 1099's, all Schedules, K-1's and/or any other documentation to confirm wages

## C. Sources of Support

Estimate the type, source and value of support you will receive from January 1, 2025 through December 31, 2025. Support includes money paid to you directly, money paid on your behalf for educational expenses, rent, food, etc., as well as living space provided free of charge. Examples of how cost might be covered: Employment, family members, financial aid, partner/spouse, roommate split, savings, 529 or other college account, GI Benefits, etc.

**Do not leave this section blank.**

	Monthly Cost	How The Cost Was Covered
Rent or Mortgage	\$	
Food	\$	
Personal Expenses	\$	
Cell Phone	\$	
Cable/Internet	\$	
Electric/Gas/Water	\$	
Household Supplies	\$	
Gasoline and Auto Maintenance	\$	
Public Transportation	\$	
Medical/Health Expenses	\$	
Auto Insurance	\$	
Educational Cost	\$	
Credit Card Payments	\$	
Other	\$	
<b>Total Cost:</b>	<b>\$</b>	

## D. Signature and Certification

- Each person signing below certifies that all information reported is complete and correct.
- The student and one parent whose information was reported on the FAFSA must sign and date.
- I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail, or both.

\*Signatures must be handwritten. Computer fonts are not acceptable.

Student Signature

Date

\*Signatures must be handwritten. Computer fonts are not acceptable.

Spouse Signature

Date

### Use one of the following methods to return this form:

Online Upload (preferred): <https://www.wm.edu/financialaid/box>

Fax: 757-221-2515

*To protect your data, we do not accept documents via e-mail attachment*

Mail: Office of Student Financial Aid  
William & Mary  
P.O. Box 8795  
Williamsburg, VA 23187-8795

Office of Student Financial Aid  
William & Mary  
Blow Memorial Hall, Room 124  
262 Richmond Road  
Williamsburg, VA 23185