



WILLIAM & MARY  
NATIONAL INSTITUTE OF  
AMERICAN HISTORY & DEMOCRACY

# Financial Assistance Application

**Please read and complete all items listed on this form.** Families wishing to request assistance should submit all forms and supporting documents as soon as possible. To request financial assistance, please submit:

- Completed Financial Assistance Application (all pages of this packet)
- Copies of your family's 2024 Tax Returns
- Personal statement explaining your request for financial assistance from NIAHD

NIAHD's financial assistance packages are limited and are only awarded to students with a demonstrated need. To help as many students attend the Pre-College Program as possible, we do not provide full assistance packages.

NIAHD will review individual requests for financial assistance once all items from the student's Program Application **and** the Financial Assistance Application are completed and received.

Requests will be reviewed in the order in which they were received and decisions regarding financial assistance are communicated to the students via email at the same time as their admission's decision.

**Student Name** \_\_\_\_\_

(Please Print)

**Student ID # (aka, 93#)** \_\_\_\_\_

(If you do not have an ID yet, please leave blank. If you do not remember your ID, please contact the TSC - <https://www.wm.edu/offices/it/services/support/tsc/index.php>)

**Preferred Session**

Session 1  
(June 22-July 12)

Session 2  
(July 13-August 2)

**Preferred Course** History \_\_\_\_\_



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A. Parent / Guardian 2024 Federal Tax Returns	Student 2024 Federal Tax Returns
<ul style="list-style-type: none"> <li>• <b>Attach a complete copy of your parent's/guardians' 2024 tax returns.</b> If they file separate forms, we will need a copy of both. If your parents/guardians are separated or divorced, submit only a copy of the Form 1040 from the custodian(s).</li> <li>• If your parents/guardians <u>are not</u> required to file a 2024 federal tax return, <b>you must submit a copy of their most recent W-2s and an explanation of the reason why they did not file a 2024 federal tax return.</b> You may provide a summation of their earnings here, but a full explanation and W-2s are still required:</li> </ul>	<ul style="list-style-type: none"> <li>• We only require federal tax returns from students if they filed independently from their parents/guardians.</li> <li>• If the student filed a 2024 federal tax return independently from their parents/guardians, they must attach a complete copy.</li> <li>• Students will <u>still</u> be required to submit copies of their parents'/guardians' 2024 federal tax forms as outlined in the box on the left.</li> </ul>

(Do not fill this section if you did file a 2024 federal return)

Employer(s)	Amount Earned
_____	\$ _____
_____	\$ _____

**B. Parent / Guardian. General & Employer Information**

Parent 1  Guardian 1 \_\_\_\_\_  
Name

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Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Occupation / Employer \_\_\_\_\_ No. of years \_\_\_\_\_

Self-Employed \_\_\_\_\_ Unemployed & Date of Last Employment \_\_\_\_\_

Parent 2  Guardian 2 \_\_\_\_\_  
Name

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Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Occupation / Employer \_\_\_\_\_ No. of years \_\_\_\_\_

Self-Employed \_\_\_\_\_ Unemployed & Date of Last Employment \_\_\_\_\_



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**C. Residential Information**

Parents' / Guardians' monthly residential mortgage / rental payment \$ \_\_\_\_\_ Purchase Price \$ \_\_\_\_\_  
 Year home purchased (if owned) \_\_\_\_\_

**D. 2024 Untaxed Income & Benefits**

1. Deductible IRA and / or Keogh payments from Form 1040.	\$ _____
2. Payments to tax-deferred pension/savings plan (paid directly or withheld from earnings); include untaxed Portions of 401(k)/403(b)plans.	\$ _____
3. Housing/food and other living allowances (excluding rent subsidies for low-income housing) paid to members of the military/clergy and others.	\$ _____
4. Tax-exempt interest income from Form 1040.	\$ _____
5. Untaxed portions of Pensions from Form 1040 (excluding "rollovers").	\$ _____
6. Foreign income exclusion from Form 2555.	\$ _____
7. Earned Income Credit from Form 1040.	\$ _____
8. Social Security benefits.	\$ _____
9. Welfare benefits (ADC, AFDC).	\$ _____
10. Child Support received for all children (annually).	\$ _____
11. Other	\$ _____
<b>12. Total untaxed income (add 1 through 11)</b>	\$ _____

**E. Household Members, including parents/guardians, and siblings**

Name of Household Member	Age	School Attended in Current Academic Year
1. Student Applicant:		
2.		
3.		
4.		

**Please list additional members on a separate page.**



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**F. Explanations and unusual circumstances - Use the space below to provide a detailed explanation of your or your family's need for financial assistance. You may continue on the following page if additional space is needed.**

**Student Name** \_\_\_\_\_  
(Please Print)

**Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
(Required)

**Parent / Guardian Name** \_\_\_\_\_  
(Please Print)

**Parent / Guardian Signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
(Required)

**Please return signed forms, explanations, and tax returns to:**

Email (preferred): [precol@wm.edu](mailto:precol@wm.edu)

Mail: **U.S. Postal Service & Other (FedEx, UPS, DHL, etc.)**

William & Mary

National Institute of American History & Democracy

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