

# W&M FINANCIAL AID

## 2023 - 2024 Dependency Override Form

Name:  W&M Student ID #:

This form can be used to request a review of extenuating circumstances regarding your dependent status. Examples of estrangement or dysfunction include, but are not limited to abuse, abandonment, drug abuse, and parent incarceration. These extenuating circumstances must be documented by an objective third party to qualify.

### The following examples will not make you independent:

- 1) Parents refuse to financially contribute to the student's education
- 2) Parents refuse to fill out information necessary to complete the FAFSA
- 3) Parents do not claim the student as a dependent for income tax purposes
- 4) Student demonstrates total self-sufficiency

### Required Documentation

The following items are required to be submitted before consideration will be made to review the appeal.

- Complete your 2023 - 2024 FAFSA at [www.studentaid.gov](http://www.studentaid.gov) Do not submit this form until your FAFSA has been submitted.
- Submit a typed and signed letter detailing the special circumstances that make you independent from your parents. You must describe your current relationship (even if it is non-existent) with your parents. The letter must include the following details:
  - The nature of your relationship with your parents
  - Provide the date and place of your last contact with your parents, your parent's name and last known address
  - How you have been supporting yourself
- Submit **TWO** signed statements from professionals (teacher, counselor, clergy, social worker) familiar with the situation further outlining and verifying/substantiating the reasons for your independent status request. The statements must include address and telephone numbers and must be on letterhead.
- 2021 IRS Tax Return Transcripts (<https://www.irs.gov/individuals/get-transcript> or a signed copy of your 2021 Federal Tax Return, and all 2021 wage documentation (W2's 1099's all Schedules, K-1's, etc)
- Complete the W&M [2023 - 2024 Independent Student Verification Worksheet](#)

### Signature and Certification

- I certify that all of the information provided on this form is true and accurate to the best of my knowledge.
- I understand that if I reestablish a viable relationship with my parents, included but not limited to living with them or accepting their support, I must notify the Financial Aid Office immediately.
- I understand that if I purposely give false or misleading information, I may be fined, sentenced to jail, or both.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

### 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