

W&M FINANCIAL AID

2023 - 2024 Dependent Student Verification Worksheet

Student Name: _____

W&M Student ID: _____

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. Household Information

List the people in the household including:

- The **student** and the **parent(s)** whose information was **used on the FAFSA** (including a stepparent if applicable).
- The parent's other children if the parents will provide more than half of the children's support from July 1, 2023, through June 30, 2024 or if the other children would be required to provide parental information if completing a FAFSA for 2023 - 2024. Include children who meet these standards, even if a child does not live with the parents.
- **Other family members** (including grandparents) if they **now live with the parents** and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2024. (Additional documents may be requested to confirm the support).
- Number in College (if applicable): include in the space below information about any household member (**excluding parents**) who is, or will be, enrolled at least half time in a degree, diploma or certification program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024 and **include the name of the college**.

(Attach a separate page if you need more space).

Full Name	Age	Relationship	College attending in 2023 2024 and year in school	Enrolled at least half time	
				Yes	No
		Self/Student	William & Mary	Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No

Do either of the parents **listed on your FAFSA** pay child support? No Yes \$ _____ /year

Non-Custodial Parent (if applicable)

If parents are divorced or separated, provide information about the parent with whom the student does not reside

Name: _____ Address: _____

Occupation: _____

Employer: _____ Annual Income: \$ _____

Date of Divorce or separation: _____ Child Support paid to FAFSA parent in 2021: \$ _____

Is there an agreement specifying a contribution for student's education?

Yes (specify annual contribution): \$ _____ No

B. Student & Parent Tax Forms and Income Information

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

Student

- I did not work and was not required to file a 2021 Federal Tax Return
- I worked but was not required to file a 2021 Federal Tax Return and will provide:
- The amount of wages earned \$ and
 - W2's and/or 1099's to confirm the earned wages (If no wage documentation was provided by the employer - list income as untaxed below.)
- I filed a 2021 Federal Tax Return and used the IRS Data Retrieval Tool and will provide:
- All W2's, 1099's, all Schedules (1 & C), K-1's and/or any other documentation to confirm wages
- I filed a 2021 Federal Tax Return but **did not** use the IRS Data Retrieval Tool and will provide:
- 2021 tax transcript: <https://www.irs.gov/individuals/get-transcript>
 - All W2's, 1099's, all Schedules (1 & C), K-1's and/or any other documentation to confirm wages

Parent

- I was not required to file a 2021 Federal Tax Return and will provide:
- IRS Verification of Non-Filing **AND**
 - (If applicable) The amount of 2021 wages earned \$ and
 - (if applicable) W2's and/or 1099's to confirm the earned wages
- I filed a 2021 Federal Tax Return and used the IRS Data Retrieval Tool and will provide:
- All W2's, 1099's, all Schedules (1 & C), K-1's and/or any other documentation to confirm wages
- I filed a 2021 Federal Tax Return but **did not** use the IRS Data Retrieval Tool and will provide:
- 2021 tax transcript: <https://www.irs.gov/individuals/get-transcript>
 - All W2's, 1099's, all Schedules (1 & C), K-1's and/or any other documentation to confirm wages
 - Provide both parent/stepparent tax returns if they did not file married joint
- I filed a 2021 Foreign Tax Return but am ineligible to use the IRS Data Retrieval Tool and will provide:
- A signed copy of the foreign return translated into English and converted to U.S. dollars.
- I am self-employed and do not receive W2's and will provide:
- 1099's, all Schedules (1 & C), K-1's and/or any other documentation to confirm wages

Untaxed income is income that you or your parent has received but was not taxable. Examples include child support received, living allowances (e.g. military, clergy), Veterans non-educations benefits, workers compensation, or any money that was received or paid on your behalf (such as bills) not reported elsewhere on this form. Please provide the source and amount of any untaxed income received in 2021 in the table below: Do not include Social Security Disability

2021 Untaxed Income List all sources of untaxed income		Parent Amount	Student Amount
Source 1:		\$	\$
Source 2:		\$	\$
Source 3:		\$	\$
Source 4:		\$	\$
Source 5:		\$	\$

C. Asset Information

Assets <i>Do not leave any questions blank. Enter "0" if N/A</i>		Parent Amount	Student Amount
Cash, Savings, Checking	Enter total balance of cash, savings, and checking accounts as of today.	\$	\$
Real Estate Investments	Enter the total market value (total value minus debt) of investment real estate (include rental property, land, second or summer homes) as of today. <i>Do NOT include primary residence.</i>	\$	\$
Investment Value	Examples include: 529 and college savings for all dependents in the household, trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, etc. as of today. <i>Do NOT include IRAs, pensions, or other retirement accounts.</i>	\$	\$
Business Value	Include the market value of land, buildings, machinery, equipment, inventories, etc. as of today. Do you have more than 100 employees? <input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
Investment Farm Value	Include the market value of land, buildings, machinery, equipment, livestock, inventories, etc. as of today. <i>Do NOT report the farm as an investment if it is the principal place of residence for you and your family.</i>	\$	\$

Additional Parent Information	Amount in Whole Dollars
Parents total monthly home mortgage/rental payment:	\$
What is the current mortgage balance?	\$
What is the current market value of your home?	\$
What was the purchase price of your primary residence?	\$

D. 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 purposely give false or misleading information, I may be fined, sentenced to jail, or both.

*Signature must be written, computer fonts are not acceptable.

Student Signature

Date

*Signature must be written, computer fonts are not acceptable.

Parent 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