

W&M FINANCIAL AID

2023 - 2024 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. Household Information

List the people in your household including yourself, your spouse (if applicable) your children (if applicable) if you will provide more than half of their support from July 1, 2023 to June 30th, 2024. You will also include anyone else who is living with you and/or receiving more than half of their financial support from you through June 30th, 2024. Include the name of the college if a household member will be attending at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution between July 1, 2023 and June 30, 2024. (Attach a separate page if you need more

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

B. Student and Spouse Tax Forms and Income Information

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

Student

I was not required to file a 2021 Federal Tax Return and will provide:

- IRS Verification of Non-Filing Letter: <https://www.irs.gov/individuals/get-transcript>
- (if applicable) The amount of 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, K-1's and/or any other documentation to confirm wages.

I filed a 2021 Federal Tax Return but am ineligible to use the IRS Data Retrieval Tool and will provide:

- 2020tax transcript: <https://www.irs.gov/individuals/get-transcript>
- All W2's, 1099's, all Schedules, K-1's and/or any other documentation to confirm wages

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, K-1's and/or any other documentation to confirm wages.

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

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

Do either you (or your spouse) pay child support? No Yes \$_____ per year

Important Note:

If the student is married, notify the financial aid office if the student or student's spouse filed separate IRS income tax returns for 2021 or had a change in marital status after December 31, 2021. Additional documentation may be needed.

C. Sources of Support

Estimate the type, source and value of support you will receive from January 1, 2023 through December 31, 2023. 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. **Do not leave this section blank.**

	Monthly Cost	How The Cost Was Covered <i>(Employment, Parents, Financial Aid, Partner, Roommate, Savings, IRA withdraw, etc.)</i>
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	\$	
Total Cost:	\$	

D. Asset Information

Assets <i>Do not leave any questions</i>		Student Amount	Spouse 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. Do NOT include primary residence.	\$	\$
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. Do NOT include IRAs, pensions, or other retirement accounts.	\$	\$
Business Value	Include the market value of land, buildings, machinery, equipment, inventories, etc. 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. Do NOT report the farm as an investment if it is the principal place of residence for you and your family.	\$	\$

E. 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.

*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
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262 Richmond Road
Williamsburg, VA 23185