W&M FINANCIAL AID

2025 - 2026 Dependent Student Verification Worksheet

Student Name: W&M Student ID:

Verification allows William & Mary to ensure the information you reported on your FAFSA 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 parents, even if the student is not living with them.
  - Exclude a parent who has died or is not living in the household due to separation or divorce.
  - Include stepparent if applicable.
  - Include a parent or stepparent on active duty with the U. S. Armed Forces apart from the family.
- The student's siblings and/or other persons if all the following are true:
  - They live with the student's parents (or live apart due to college enrollment),
  - They receive more than half of their support from the student's parents **and**
  - They will continue to receive more than 50.1% of support from the student's parents from 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 & Parent Tax Forms and Income Information

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

☐ Parents are married and file their taxes separately (Married filing separately, head of household, single, etc.) *(provide 1040 signed tax returns for each parent in the household)*

☐ Parents filed an amendment to their 2023 tax return. *(provide 1040X signed)*

☐ Parents have 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)*

☐ None of the above statements apply to my parents.

Parent(s) Continued

☐ I was not required to file a 2023 Federal Tax Return and will provide:
- IRS Verification of Non-Filing **AND**
- **(if applicable) any W2's, 1099 or other documents of wages**

☐ I filed a 2023 Federal Tax Return and used the IRS Direct Data Exchange when filing the FAFSA
- 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 **could not use** the IRS Direct Data Exchange and will provide:
- 2023 Tax Return Transcript or a signed copy of the 2023 Federal 1040 and schedules associated with the 1040.
- All W2's, 1099's, all Schedules, K-1's and/or any other documentation to confirm wages

☐ I filed a 2023 Foreign Tax Return but am ineligible to use the IRS Direct Data Exchange 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

Student

☐ I did not work and was not required to file a 2023 Federal Tax Return

☐ I worked but was not required to file a 2023 Federal Tax Return and will provide:
- (if applicable) The amount of wages earned $ _____ and
- (if applicable) W2's and/or 1099's and Schedule C to confirm the income earned

☐ **Check this Box if a W2 was not provided and list employer and earnings amount list below.**

Employer	*Income Earned*

☐ I filed a 2023 Federal Tax Return and used the IRS Direct Data Exchange when filing the FAFSA
- 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 **could not use** the IRS Direct Data Exchange. and will provide
- 2023 Tax Return Transcript or a signed copy of the 2023 Federal 1040 and schedules associated with the 1040.
- All W2's, 1099's, all Schedules, K-1's and/or any other documentation to confirm wages

C. 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 *(required)* Date

Parent Signature *(required)* 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