

# W&M FINANCIAL AID

## 2026 - 2027 Dependent Student Verification Worksheet

Student Name:

W&amp;M Student ID:

Verification allows our office to confirm the accuracy of the information reported on your FAFSA. Please complete this form and submit all required documentation to ensure timely processing of your financial aid. Any discrepancies identified between the FAFSA and the supporting documentation may result in a revision to your 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 2026 through August 2027

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 2026 – 2027 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
		<i>Self/Student</i>

### 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 2025: \$ \_\_\_\_\_

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.

### Parent(s) Continued

- ☐ I was not required to file a 2024 Federal Tax Return and will provide:
- IRS Verification of Non-Filing and
  - (if applicable) any W2's, 1099, IRS Wage and Income Transcript or other document of wages
- ☐ I filed a 2024 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 2024 Federal Tax Return but could not use the IRS Direct Data Exchange and will provide:
- 2024 Tax Return Transcript or a signed copy of the 2024 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 2024 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 2024 Federal Tax Return
- ☐ I worked but was not required to file a 2024 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        |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
- ☐ I filed a 2024 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 2024 Federal Tax Return but could not use the IRS Direct Data Exchange, and will provide
- 2024 Tax Return Transcript or a signed copy of the 2024 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