



WILLIAM & MARY
NATIONAL INSTITUTE OF
AMERICAN HISTORY & DEMOCRACY

Financial Assistance Application for Dependent Students

due April 15 for Fall Semester / November 15 for Spring Semester

Please read and complete all items listed on this form. Visiting Students in the Public History & Material Culture Program wishing to request financial assistance from NIAHD must submit all forms and supporting documents in addition to the student's program application packet. To request financial assistance, please submit:

- Completed Financial Assistance Application (all pages of this packet)
- Copies of the family's or student's current Tax Returns. (For students enrolling in Summer or Fall, please submit returns filed between February & April of the current calendar year.)
- Letter explaining the student's need for financial assistance

NIAHD's financial assistance packages are limited and are only awarded to students with a demonstrated need. To help as many students as possible, we do not provide full scholarships for Visiting Students.

NIAHD will not begin reviewing requests for financial assistance until all items from the Program Application and the Financial Assistance Application are completed and received. Requests will be reviewed in the order in which they were received.

Decisions regarding financial assistance are communicated to the students via email at the same time as their admission's decision.

Student Name _____
(Please Print)

Preferred Semester(s) Fall 20____ Spring 20____
(You may select one or both semesters to attend the PHMC Program)



Last Name _____

Semester(s) _____

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Financial Assistance Application

A.1. Parent / Guardian Federal Tax Returns

- **Attach a complete copy of your parent(s) / guardian(s) tax returns.** If they file separate forms, we will need a copy of both. If they are separated or divorced, submit only a copy of the Form 1040 from the custodial parent(s) / guardian(s).
- If your parent(s) / guardian(s) are not required to file a current federal tax return, **you must submit a copy of their most recent W-2s and an explanation of the reason why they did not file a current federal tax return.** You may provide a summation of their earnings here, but a full explanation and W-2s are still required:

A.1.a. Parent / Guardian Earnings Summation

(Do not use this section if your parent(s) / guardian(s) did file a current federal return)

Employer(s)	Amount Earned
_____	\$ _____
_____	\$ _____
_____	\$ _____

A.2. Student Federal Tax Returns

- Students attending the Program for Visiting Students who filed a current federal tax return **independently from their parent(s) / guardian(s), must attach a complete copy of their returns.**
- If you did not and are not required to file a current federal tax return, **you must submit a copy of your most recent W-2s and an explanation for why you have not filed a current federal tax return.** You may provide a summation of your earnings here, but a full explanation and W-2s are still required:

A.2.a. Student Earnings Summation

(Do not use this section if you did file a current federal return)

Employer(s)	Amount Earned
_____	\$ _____
_____	\$ _____
_____	\$ _____

B. Parent / Guardian / Student General & Employer Information

Parent 1 Guardian 1 Student _____
Name

Street Address _____ City _____ State _____ Zip Code _____

Occupation / Employer _____ No. of years _____

Self-Employed Unemployed & Date of Last Employment _____

Parent 2 Guardian 2 _____
Name

Street Address _____ City _____ State _____ Zip Code _____

Occupation / Employer _____ No. of years _____

Self-Employed Unemployed & Date of Last Employment _____



Last Name _____

Semester(s) _____

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Financial Assistance Application

C. Residential Information

Parents' / Guardians' / Student's monthly home mortgage / rental payment \$ _____ Purchase Price \$ _____
 Year home purchased (if owned) _____

D. Current Year's Untaxed Income & Benefits

1. Deductible IRA and / or Keogh payments from Form 1040.	\$ _____
2. Payments to tax-deferred pension/savings plan (paid directly or withheld from earnings); include untaxed Portions of 401(k)/403(b)plans.	\$ _____
3. Housing/food and other living allowances (excluding rent subsidies for low-income housing) paid to members of the military/clergy and others.	\$ _____
4. Tax-exempt interest income from Form 1040.	\$ _____
5. Untaxed portions of Pensions from Form 1040 (excluding "rollovers").	\$ _____
6. Foreign income exclusion from Form 2555.	\$ _____
7. Earned Income Credit from Form 1040.	\$ _____
8. Social Security benefits.	\$ _____
9. Welfare benefits (ADC, AFDC).	\$ _____
10. Child Support received for all children (annually).	\$ _____
11. Other	\$ _____
12. Total untaxed income (add 1 through 11)	\$ _____

E. ALL Household Members Residing in the Home.

Name of Household Member	Age	School Attended in Current Academic Year
1. Student Applicant:		
2.		
3.		
4.		
5.		

Please list additional members on a separate page.



Last Name _____

Semester(s) _____

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Financial Assistance Application

F. Explanations and unusual circumstances - Use the space below to provide a detailed explanation of your or your family's need for financial assistance. You may continue onto a separate page if additional space is needed.

[Large empty rectangular box for providing detailed explanation]

Student Name _____
(Please Print)

Student Signature _____ **Date** _____
(Required)

Parent / Guardian Name _____
(Please Print)

Parent / Guardian Signature _____ **Date** _____
(Required)

Please return signed form, explanations, and tax returns to:

Email: NIAHD@wm.edu (preferred)

Mail: **U.S. Postal Service**
William & Mary
National Institute of American History & Democracy
P.O. Box 8795
Williamsburg, Virginia 23187-8795

Other (FedEx, UPS, DHL, etc.)
William & Mary
National Institute of American History & Democracy
205 Griffin Avenue
Williamsburg, Virginia 23185-4023