



WILLIAM & MARY
NATIONAL INSTITUTE OF
AMERICAN HISTORY & DEMOCRACY

Financial Assistance Application for Independent 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. 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.a. Student Earnings Summation

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

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

B. General & Employer Information

Full Legal Name _____
First M.I Last

Address _____
Street Address City State Zip Code

Occupation / Employer _____
No. of years

Self-Employed, or

Unemployed & Date of Last Employment _____

C. Residential Information

Student's monthly home mortgage / rental payment \$ _____ Purchase Price \$ _____

Year home purchased (if owned) _____



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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)	\$ _____



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

Student Name _____
(Please Print)

Student 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.)

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