

P.O. Box 400204, Carruthers Hall Charlottesville, VA 22904-4204 Telephone: (434) 982-6000

Website: http://sfs.virginia.edu

IDSU

Independent Document of Support Form 2023-2024

Purpose of Form

Generally, the Independent Document of Support Form is requested to provide a more detailed picture of your and, if applicable, your spouse's financial strength. This form collects information about income received in 2021 as well as some of the most common expenses that may have been incurred in 2022.

Students are considered independent for financial aid purposes if they meet one of the following criteria: you were born prior to January 1, 2000, you can answer "yes" to any 2023-2024 FAFSA dependency question (described here: https://studentaid.gov/apply-for-aid/fafsa/filling-out/dependency), or a dependency appeal was approved by Student Financial Services.

General Instructions

Students who are married must report their spouse's income as well as their own. For each field, report the appropriate values from the 2021 calendar year. Be sure to report all sources of income, whether domestic or foreign.

Independent students must report *student/spouse* expenses for 2021. Carefully read each item and report monthly expenses where appropriate. Multiply all monthly expenses by 12 to calculate the annual amount. If a monthly expense was not incurred for all 12 months of 2021, provide only the total amount for that particular expense in 2021 and **provide a statement explaining the situation.** For example, if car payments were made for only 6 months instead of 12 because the car was paid off after 6 months, provide a statement to clarify.

If your 2021 expenses exceeded your 2021 reported income, you must provide a written explanation of how you and/or your spouse were meeting expenses. Forms showing greater total expense than income and received without a written explanation will be considered incomplete. If you wish to provide any additional information regarding your or your spouse's financial circumstances, please submit it along with this form.

Student Financial Services may request third-party documentation to confirm the values you report on your Independent Document of Support Form. Should you submit a form with incorrect information, you must also submit third-party documentation to confirm the correct values. Adjustments to a financial aid award as a result of submitting documentation to correct an Independent Document of Support Form are neither guaranteed nor immediate.

Forms received without the appropriate signature(s) or with missing information/pages are considered incomplete and must be resubmitted. **Do not leave any questions blank**. Enter "0" or "N/A," if appropriate. Submitting incomplete forms or documents will delay the evaluation of your financial aid eligibility and the awarding of your financial aid.

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Student's University	D:	or SIS ID:	
Student's Full Name: (LEGAL NAME - PRINT)	first	middle	last

Report Values for	Annual Amounts (please leave no blanks)			
Calendar Year 2021 only (enter "0" or "N/A", if appropriate)	Student	Spouse		
Adjusted Gross Income as reported on 2021 tax return (if you will not file 2021 taxes or haven't done so yet, report total wages earned from work in 2021)				
If self-employed or a business owner, indicate withdrawals from a business used in 2021 to meet household or personal expenses. (do not include amounts already reported above, in Adjusted Gross income)				
Payments to tax-deferred pension and retirement savings plans in 2021				
Total contributions to Flexible Spending Accounts in 2021				
Alimony received in 2021 (exclude if already reported on 2021 tax return and included in AGI above)				
Spousal support received by you or your spouse in 2021 (exclude child support reported above and alimony reported on this form or included in AGI above; include support such as mortgage, rent, auto, utilities, insurance, education, etc. paid on behalf of student or spouse)				
Untaxed distributions from retirement plans received in $2021 - e.g.$, Pension/IRA/401k (exclude <u>taxed</u> portion of distributions if already reported on 2021 tax return and included in AGI above)				
Child support received in 2021 for <u>all</u> children in the household				
Did any family member in the household receive Social Security benefits including Social Security retirement and/or SSDI? Submit copies of all 2021 SSA-1099s for each person in the household who received this type of income/benefit, and list the total amount of all benefits in the column at right; then list recipient(s) & relationship(s) to student:				
On-base military housing or the value of a basic military allowance for housing (submit copy of final Leave and Earnings (LES) statement of 2021)				
Housing, food and other living allowances paid in 2021 by your or your parent(s)'s employer (exclude the value of on-base military housing or of a basic military allowance for housing listed above)				
Value of employer-provided housing (vs. housing allowance noted above)				
Veterans non-education benefits received in 2021 (e.g., Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances)				

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Student's University ID: Or SIS ID SECTION 1: INCOME AND SUPPORT for calendar year 2021 (CONTINUED)	:			
Report Values for	Annual Amounts (please leave no blanks)			
Calendar Year 2021 only (enter "0" or "N/A", if appropriate)	Student	Spouse		
Total <i>loans</i> received in 2021 from family and friends, including those living outside the U.S.				
Total cash assistance (excluding any loans noted above) received in 2021 from family and friends, including those living outside the U.S.				
Merit- or need-based financial aid received in 2021				
Veterans educational benefits received in 2021				
Expenses paid in 2021 by someone else, on your behalf, including those related to mortgage, rent, automobile, utilities, education, or insurance. These would be expenses paid by another person, such as a parent, friend or relative. (Do not include any alimony or spousal support already reported on the previous page)				
Include any distributions to the student from an educational savings plan, such as a 529 plan, if it is owned by someone other than you/your spouse.				
Note: If you are living rent-free with others, do not include the value of your housing here. Instead, report the value of this benefit in the appropriate table on page 4.				
Other income received in 2021 not otherwise reported (e.g., worker's compensation, disability, untaxed portions of health savings accounts from Schedule 1 Line 12 of the 2021 IRS Form 1040, Black Lung Benefits, etc.) List source(s):				

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Total Income in 2021 (MUST include values from previous page)

\$

\$



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Student's University ID:			: 🗆 🗆					
Please indicate with a check mark below if any family me received any of these benefits in 2021.	·		ld		eive	t total annual d by your far from each so	mily in 2	
SNAP (Supplemental Nutrition Assistance Program)	□ Yes		No No	\$				
WIC (Women, Infants and Children supplemental program)	□ Yes		No	\$				
TANF (Temporary Assistance for Needy Families)	□ Yes		No	\$				
Medicaid/SSI (Supplemental Security Income)	□ Yes		No	\$				
Free or reduced price lunch	□ Yes		No No	\$				
Other benefit (such as subsidized housing) List source(s):	□ Yes		1 No	\$				
Did you or your spouse own a home, pay rent, or live rent-free with others (including parents) in 2021? Please check appropriate box, at right.	Own home	• -	Pay Ren	t		Live rent-fi		
*With whom did you or your spouse live rent-free? If you or your spouse lived rent-free in 2021, you must value of the housing, based on the amount a third part paying for the same amount of space. Enter that value	y might pay if t	hey we	re occupy	-	ınd	\$(Exclude reported on fo		S
Did you live with your parents during the 2021 calendar parents for the entire year, please include a detailed brarrangements in 2021.)				your		□ Yes	_ N	10
Do you plan to live with your parents while attending cl year? (If you do not plan to live with your parents for th a detailed breakdown of anticipated housing arrangement	e entire acade	mic yea	ar, please	inclu	de	□ Yes	_ N	No

(Expenses noted on next page)

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If there are any special circumstances regarding your sources of income and support, please note them here:



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SECTION 2: EXPENSES for calendar year 2021

David William for Called Law York 2024 and	Expenses (report total of student and, if applicable, spouse expenses)			
Report Values for Calendar Year 2021 only	Monthly	Annual Total		
Primary housing (mortgage, rent or monetary value of housing if living rent-free with others)	X12			
Primary housing real estate and/or property tax paid in 2021 (do not report if already included in mortgage payments)	X12			
Homeowner's/Renter's Insurance paid in 2021 (do not report if already included in mortgage payments)	X12			
Combined utilities paid (electric, gas, internet/cable, landline phone service, water)	X12			
Cell phone bill payments	X12			
Combined car payments for all vehicles	X12			
Auto insurance paid in 2021 for all vehicles	X12			
Other insurance payments not noted above (health insurance, life insurance, etc., but excluding employer-paid premiums)	X12			
Transportation costs (bus/train fares, fuel expenses, car maintenance, etc.)	X12			
Food and grocery expenses	X12			
Medical expenses paid out of pocket (medication, dentist or doctor visit, etc.)	X12			
Child/dependent care expenses	X12			
Household/personal expenses	X12			
Entertainment/leisure/membership expenses	X12			
Consumer debt payments (home equity, credit card, other loans, excluding any household or other expenses already noted above)	X12			
Education expenses paid out of pocket	X12			
Other monthly expenses not listed above:				
	X12			
Total Expenses in 2021 (MUST include values from previous page)	\$	\$		

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Did your and/or your spouse's 2021 expenses exceed 2021 income? If YES, pleas igned statement with any relevant details, including how you (and your spousplicable) were able to meet your 2021 expenses. In addition to explaining he (and your spouse, if applicable) were meeting 2021 expenses, you may provide additional information concerning your income and/or expenses that you wish with us. If you (and your spouse if applicable) used a loan or credit card(s) to nexpenses, you must also submit a copy of the loan promissory note or credit card statement(s) to verify this.	use, if Sow you e any Point to share neet Some Some Some Some Some Some Some Some	☐ Yes Statement is REQUIRED. Please attach signed statement to this form.	□ No
If there are any special circumstances regarding your expenses, please note t	hem here:		
in there are any openiar an earnistances regarding your expenses, preuse note			

CERTIFICATION STATEMENT: I certify that all the information reported to qualify for federal aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner. I understand that if I purposely give false or misleading information, I may face legal consequences and my financial aid may be terminated. The student must sign and date this form.

STUDENT SIGNATURE Date	TUDENT SIGNATURE Date
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