

IDSU

**Independent Document of Support Form
2024-2025**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 2022 as well as some of the most common expenses that may have been incurred in 2023.

Students are considered independent for financial aid purposes if they meet one of the following criteria: you were born prior to January 1, 2001, you can answer "yes" to any 2024-2025 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 2022 calendar year. Be sure to report all sources of income, whether domestic or foreign.

Independent students must report *student/spouse* expenses for 2022. 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 2022, provide only the total amount for that particular expense in 2022 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 2022 expenses exceeded your 2022 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 ID: - or SIS ID:

Student's Full Name: _____
(LEGAL NAME - PRINT) first middle last

SECTION1: INCOME AND SUPPORT for calendar year 2022

Report Values for Calendar Year 2022 only (enter "0" or "N/A", if appropriate)	Annual Amounts (please leave no blanks)	
	Student	Spouse
Adjusted Gross Income as reported on 2022 tax return (if you will not file 2022 taxes or haven't done so yet, report total wages earned from work in 2022)		
If self-employed or a business owner, indicate withdrawals from a business used in 2022 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 2022		
Total contributions to Flexible Spending Accounts in 2022		
Alimony received in 2022 (exclude if already reported on 2022 tax return and included in AGI above)		
Spousal support received by you or your spouse in 2022 (exclude child support reported above and alimony reported on this form <u>or</u> 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 2022 – e.g., Pension/IRA/401k (exclude <u>taxed</u> portion of distributions if already reported on 2022 tax return and included in AGI above)		
Child support received in 2022 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 2022 SSA-1099s for each person in the household who received this type of income/benefit, and list <i>the total amount of all benefits</i> 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 2022)		
Housing, food and other living allowances paid in 2022 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 2022 (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 2022 (CONTINUED)

Report Values for Calendar Year 2022 only (enter "0" or "N/A", if appropriate)	Annual Amounts (please leave no blanks)	
	Student	Spouse
Total <i>loans</i> received in 2022 from family and friends, including those living outside the U.S.		
Total <i>cash assistance</i> (excluding any loans noted above) received in 2022 from family and friends, including those living outside the U.S.		
Merit- or need-based financial aid received in 2022		
Veterans educational benefits received in 2022		
Expenses paid in 2022 <i>by someone else, on your behalf</i> , including those related to mortgage, rent, automobile, utilities, education, or insurance. These would be expenses <i>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)</i>		
Include any distributions to the student from an educational savings plan, such as a 529 plan, if it is <u>owned by someone other than you/your spouse.</u>		
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 2022 not otherwise reported (e.g., worker's compensation, disability, untaxed portions of health savings accounts from Schedule 1 Line 12 of the 2022 IRS Form 1040, Black Lung Benefits, etc.) List source(s): _____ _____		
Total Income in 2022 (MUST include values from previous page)	\$	\$

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Student's University ID: - or SIS ID:
SECTION 2: EXPENSES for calendar year 2022

Report Values for Calendar Year 2022 only	Expenses (report total of student and, if applicable, spouse expenses)	
	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 2022 (do not report if already included in mortgage payments)	X12	
Homeowner's/Renter's Insurance paid in 2022 (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 2022 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: <div style="border: 1px solid black; height: 15px; width: 400px; margin-top: 5px;"></div>	X12	
Total Expenses in 2022 (MUST include values from previous page)	\$	\$

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2024-2025**Student's University ID: - or SIS ID:

Did your and/or your spouse's 2022 expenses exceed 2022 income? If YES, please attach a signed statement with any relevant details, including how you (and your spouse, if applicable) were able to meet your 2022 expenses. In addition to explaining how you (and your spouse, if applicable) were meeting 2022 expenses, you may provide any additional information concerning your income and/or expenses that you wish to share with us. If you (and your spouse if applicable) used a loan or credit card(s) to meet expenses, you must also submit a copy of the loan promissory note or credit card statement(s) to verify this.

☐ Yes
**Statement is
REQUIRED.
Please attach
signed
statement to
this form.**

☐ No

If there are any special circumstances regarding your expenses, please note them here:

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 _____