

IDSU

**Independent Document of Support Form
2025-2026**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 2023 as well as some of the most common expenses that may have been incurred in 2024.

Students are considered independent for financial aid purposes if they meet one of the following criteria: you were born prior to January 1, 2002, you can answer "yes" to any 2025-2026 FAFSA personal circumstances questions (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 2023 calendar year. Be sure to report all sources of income, whether domestic or foreign.

Independent students must report *student/spouse* expenses for 2023. 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 2023, provide only the total amount for that particular expense in 2023 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 2023 expenses exceeded your 2023 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

SECTION 1: INCOME AND SUPPORT for calendar year 2023

Table with 3 columns: Report Values for Calendar Year 2023 only, Annual Amounts (Student), Annual Amounts (Spouse). Rows include Adjusted Gross Income, tax-deferred pension, Flexible Spending Accounts, Alimony, Spousal support, Retirement plans, Child support, Social Security benefits, Military housing, and Veterans benefits.

IDSU

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 Student's University ID: - or SIS ID:
SECTION 1: INCOME AND SUPPORT for calendar year 2023 (CONTINUED)

Report Values for Calendar Year 2023 only <small>(enter "0" or "N/A", if appropriate)</small>	Annual Amounts <small>(please leave no blanks)</small>	
	Student	Spouse
Total <i>loans</i> received in 2023 from family and friends, including those living outside the U.S.		
Total <i>cash assistance</i> (excluding any loans noted above) received in 2023 from family and friends, including those living outside the U.S.		
Merit- or need-based financial aid received in 2023		
Veterans educational benefits received in 2023		
Expenses paid in 2023 <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 2023 not otherwise reported (e.g., worker's compensation, disability, untaxed portions of health savings accounts from Schedule 1 Line 13 of the 2023 IRS Form 1040, Black Lung Benefits, etc.) List source(s): _____ _____		
Total Income in 2023 (MUST include values from previous page)	\$	\$

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 Student's University ID: - or SIS ID:
SECTION 1: INCOME AND SUPPORT for calendar year 2023 (CONTINUED)

Please indicate with a check mark below if any family member in the household received any of these benefits in 2023.			Report total annual amount received by your family in 2023 from each source
SNAP (Supplemental Nutrition Assistance Program)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
WIC (Women, Infants and Children supplemental program)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
TANF (Temporary Assistance for Needy Families)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Medicaid/SSI (Supplemental Security Income)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Free or reduced price lunch	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Other benefit (such as subsidized or federal housing assistance) List source(s): _____	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$

Did you or your spouse own a home, pay rent, or live rent-free with others (including parents) in 2023? Please check appropriate box, at right.	Own home	<input type="checkbox"/>	Pay Rent	<input type="checkbox"/>	Live rent-free with others*	<input type="checkbox"/>
*With whom did you or your spouse live rent-free? _____ <i>If you or your spouse lived rent-free in 2023, you must provide the approximate monthly value of the housing, based on the amount a third party might pay if they were occupying and paying for the same amount of space. Enter that value in highlighted box to the right.</i>					\$ _____ /month (Exclude values reported elsewhere on form)	
Did you live with your parents during the 2023 calendar year? (If you did not live with your parents for the entire year, please include a detailed breakdown of your housing arrangements in 2023.)					<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you plan to live with your parents while attending classes during the 2025-2026 academic year? (If you do not plan to live with your parents for the entire academic year, please include a detailed breakdown of anticipated housing arrangements for the 2025-2026 academic year.)					<input type="checkbox"/> Yes	<input type="checkbox"/> No

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

(Expenses noted on next page)

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 Student's University ID: - or SIS ID:
SECTION 2: EXPENSES for calendar year 2023

Report Values for Calendar Year 2023 only	Expenses <small>(report total of student and, if applicable, spouse expenses)</small>	
	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 2023 (do not report if already included in mortgage payments)	X12	
Homeowner's/Renter's Insurance paid in 2023 (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 2023 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: <input style="width: 100%;" type="text"/>	X12	
Total Expenses in 2023 (MUST include values from previous page)	\$	\$



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<p>Did your and/or your spouse's 2023 expenses exceed 2023 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 2023 expenses. In addition to explaining how you (and your spouse, if applicable) were meeting 2023 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.</p>	<p><input type="checkbox"/> Yes Statement is REQUIRED. Please attach signed statement to this form.</p>	<p><input type="checkbox"/> No</p>
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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 _____