



Florence-Darlington Technical College
Financial Aid Center
PO Box 100548
Florence, SC 29502-0548
843.661.8085

2011-2012 REQUEST TO EVALUATE DEPENDENCY STATUS

Student Name: *Last, First, Middle*

Social Security Number

Students are classified as dependent or independent because Federal Student Aid Programs are based on the idea that students (and their parents or spouse, if applicable) have the primary responsibility for paying for their post-secondary education.

The U.S. Congress defines an independent student (for financial aid purposes) as one who meets one of the following conditions at the time the 2011-2012 Free Application for Federal Students Aid (FAFSA) is completed and signed.

- You are married
- You are a ward of the court (or were until the age 18) or both of your parents are deceased
- You were born **before** January 1, 1988
- You are currently serving on active duty in the U.S. Armed Forces for purposes other than training
- You are a Veteran of the U.S. Armed Services (discharge **must** be honorable)
- You are working on a Masters of Doctorate degree
- You have children who receive more than half of their support from you
- You have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2012

Note: You do not need to complete this form if one of the above conditions applies to you.

The Higher Education Act allows an aid administrator to consider dependency overrides on a **case-to-case** basis for students with unusual circumstances. **However, none of the conditions listed below, singly, or in combination, qualify as unusual circumstances or merit a dependency override:**

- Parents refuse to contribute to the student's education;
- Parents are unwilling to provide information on the application or for verification;
- Parents do not claim the student as a dependent for income tax purposes;
- Student demonstrates total self-sufficiency.

IMPORTANT:

- Dependency status must be re-certified every year, it does not automatically renew.
- We may request additional documentation when applicable.
- Adjustments made to you SAR as a result of granting your request may delay or change you financial aid awards.
- Requests to evaluate dependency status without required documentation will not be considered.

Instructions: To request a dependency evaluation – The following must be true for all requests:

1. Must be initiated by a letter of explanation from the student requesting consideration of his/her particular circumstances. Please explain in full.
2. Refer to documentation requirements (see below) when preparing your request.
3. Complete section 1, 2, and 3 of this form.
4. Attach a signed copy of the 2010 Federal Tax Returns.
5. Please provide a check mark in the box next to the circumstance that fits your situation.

SECTION 1: SITUATIONS IN WHICH REVISIONS MAY BE MADE TO YOUR APPLICATION

Check which situation applies to you:

A. Unusual circumstances exist within your family that prevent you from obtaining you parent’s financial information, such as:

- Incarceration of the custodial parent
- Abandonment by both parents
- History of parental alcohol or drug abuse
- Abusive home situation which is detrimental to your physical or mental well-being

Documentation Requirements:

- Two of more signed statements from third parties having first-hand knowledge of the circumstances. These should include statements on agency letterhead from social workers, school officials, church officials, or others in positions of authority that are familiar with the situation. Personal references, which do not represent an agency opinion, must be notarized.
- Copies of any court documentation relevant to your situation.
- A signed copy of student’s 2010 Federal Tax Return.
- A signed statement detailing why you should be **considered** an independent student.

B. Death of a parent after filling the FAFSA and severe circumstances exist with the surviving parent.

Documentation Requirements:

- Two or more signed statements from third parties having first-hand knowledge of the circumstances. These should include statements on agency letterhead from social workers, school officials, church officials, or others in positions of authority that are familiar with the situation. Personal references, which do not represent an agency opinion, must be notarized.
- A copy of the death certificate or newspaper obituary.
- A signed copy of student’s 2010 Federal Tax Return.
- A signed statement detailing why you should be **considered** an independent student.

C. You, the student, are divorced and during the time you were married, maintained a separate residence from your parents and you former spouse’s parents. Also, you now maintain a separate residence from your parents and pay all expenses from you own income and assets.

Documentation Requirements:

- A copy of your marriage license.
- A copy of your divorce decree.
- A signed copy of your 2010 Federal Tax Return.
- Copies of your 2010 W-2 form(s)
- A copy of your mortgage or lease agreement for the period in which you were married.
- A signed statement detailing why you should be **considered** an independent student.

SECTION 2: MONTHLY EXPENSES AND INCOME WORKSHEET (Complete Using 2011 Information)

Please indicate below, an estimate of your monthly expenses for 2011 and the name of the person who provides payment for them.

Expense	Monthly Cost	Who Pays or Provides the Expense
Housing	\$	
Utilities	\$	
Food	\$	
Child Care or Dependent Care	\$	
Transportation	\$	
Medical/Insurance	\$	
Personal (clothing, toiletries, etc...)	\$	
Other	\$	
Total Expenses:	\$	

List your average monthly income for 2011 as specified below, and list the source of that income by name: Self-employed, Employers Name, trust fund, etc.)

Type of Income	Monthly Income	Sources
Wages		
Interest/Dividends		
Untaxed Income (Social Security, Unemployment Compensation, etc...)		
Cash Support/Gift		
Federal Work Study		
TANF		
Other		
Total Income:		

NOTE: HAVE YOU COMPLETED ALL OF THE DOCUMENTATION REQUIREMENTS FOR YOUR SITUATION?

SECTION 3: ADDITIONAL INFORMATION (Answer all questions below)

1. List the **month and year** you **last** lived with you parent(s)

2. List the **month and year** you **last** received financial support from you parent(s)

3. List the year you were last claimed by someone else as an exemption on their Federal Tax Return and your relationship to them.

Year you were claimed: _____
Person who claimed you (grandparent, sister, etc...): _____

4. Check the type of Federal Tax Return that you filed for 2010 (1040, 1040A, etc.) If you did not file taxes for 2010, but did earn an income, you must list the amount of income you earned, and provide us with copies of your W2 forms for 2010.

Form 1040 _____

Form 1040A _____

Form 1040EZ, 1040 Telefile _____

Did not file * _____

*List the amount of income earned in 2010 _____

5. If you are covered under a medical plan, list the following information:

If you are not covered, list "not covered" here	_____
Name if Insurance Company	_____
Name of person/company providing coverage	_____
Name of person paying insurance premiums	_____

6. List your current phone number, home address, and e-mail address:

_____	_____	_____	_____
Street	City	State	Zip Code
_____	_____		
Phone	Email		

7. List the number of months in 2011 that you plan to live at this address: _____

8. List the name(s) of anyone that will share housing expenses with you in the 2011-2012 school year:

_____	_____
_____	_____

9. List the name of the registered owner of your automobile: _____

10. If you are the registered owner, provide the following:

Year, Make, and Model	_____
Purchase Date	_____
Total balance owed	_____
Monthly auto payment	_____
Name/relationship of person paying auto payment	_____

All of the information on this Request to Evaluate Dependency Status is true and complete to the best of my knowledge. I understand that if I give false or misleading information on this Request, I may be subject to a \$10,000 fine, a prison sentence, or both.

Student Signature

Date