

TEXAS A&M UNIVERSITY - COMMERCE
OFFICE OF FINANCIAL AID

2009-2010

PETITION FOR INDEPENDENT STATUS

The U. S. Congress and the Department of Education determine the criteria for whether a student is considered dependent or independent of their parents for financial aid purposes. Generally, how the applicant responds to the questions on Step 3 on the FAFSA determines their dependency status. If you were unable to answer “yes” to any of the questions on Step 3 of the FAFSA, but feel there are extenuating circumstances which might warrant you being considered independent of your parents, you must explain those circumstances in a petition to your Financial Aid Advisor.

PLEASE READ CAREFULLY BEFORE COMPLETING THIS APPLICATION

The basic underlying premise of student financial aid is that it is primarily the responsibility of the student and their family to pay educational costs. When family resources are insufficient, financial aid may be awarded to supplement the resources of the student’s family to help pay educational expenses. By petitioning, you are asking us to relieve your parents of the responsibility for using their resources to pay part of your college costs. Only very extenuating circumstances will make it reasonable to approve such a petition. **Be aware that having sufficient resources to pay your own expenses is NOT considered an extenuating circumstance for determining dependency status. Also, you can not use financial aid as a source of income when completing your application.**

For your petition to be considered:

1. You must not have been claimed as a tax exemption by any parent/stepparent in 2007.
2. You will not be claimed as a tax exemption by any parent/stepparent for 2008.
3. You must not have lived with your parent(s)/stepparent(s) during 2008 or any time during 2009.

Before the Office of Financial Aid can consider any changes regarding dependency status, you must provide us with all of the following documentation. Incomplete applications will not be considered.

1. Completed copy of the 2009-2010 Petition for Independent Status.
2. Copies of **your** 2007 and 2008 federal income tax returns.
3. Copies of **your parent(s)/stepparent(s)** 2007 and 2008 federal income tax returns.
4. Completed copy of the attached Reference form from your parent(s)/stepparent(s).
5. A completed Reference form from **two** of the following: a close relative with whom you are not presently living with, a high school counselor or teacher, a tax accountant and/or attorney, the person with whom you reside, a member of your religious institution, or the director of Boys’ Ranch, Children’s’ Home, Girls’ Town, or a similar institution.
6. Copy of your last pay check stub.
7. Documentation of where you have lived since January 2008 (e.g. signed lease agreements, housing contract, etc.).
8. Completed copy of the 2009-2010 Verification Form.

To begin the petition process, bring your completed Petition for Independent Status and all supporting documentation to the Office of Financial Aid. Please allow 4 - 6 weeks for processing.

2009-2010 PETITION FOR INDEPENDENT STATUS

Name: _____ Campus Wide ID: _____

Birthdate: _____ Telephone No: _____

Part I. Answer the following questions:

1. What amount of financial support did you receive from your parents in 2007? \$ _____
2. What amount of financial support will you receive from your parents in 2008? \$ _____
3. What other support do you receive from your parent(s)/step parent(s)? Examples: health or auto insurance, room and board, clothing, use of a vehicle, etc. Please identify the type of support and its approximate value.

| Source | Amount | Source | Amount |
|--------|--------|--------|--------|
| | | | |
| | | | |
| | | | |

4. Do your parents/stepparents own the property in which you reside? Yes No

Part II. Complete the following budget based on average monthly figures for the period of January 1, through December 31, 2008.

| INCOME SOURCE | MONTHLY INCOME | EXPENSES | MONTHLY EXPENSE |
|-----------------|----------------|----------------|-----------------|
| Employment | \$ _____ | Housing | \$ _____ |
| AFDC/TANF | | Food | |
| VA Benefits | | Transportation | |
| Social Security | | Utilities | |
| Child Support | | Personal | |
| Food Stamps | | Tuition/Fees | |
| Other | | Other | |
| TOTAL | \$ _____ | TOTAL | \$ _____ |

Part III. Please explain briefly what your circumstances are for requesting a change in your dependency status. Use the back if additional space is needed.

I hereby certify that the information I have submitted is true and correct. **Warning:** If you purposely give false or misleading information on this application, you may be fined, sentenced to jail, or both.

Signature _____ Date _____

For office use only:

| | | |
|------------------------------|----------|--------|
| Previous Dependency Override | Yes | No |
| Dependency Override | Approved | Denied |

