

Carleton College Student Financial Services Office

Dependency Override

Carleton uses the Federal definition for dependency when applying for financial aid. Your age is the primary determining factor of dependency and the financial information used to determine aid eligibility and need. If you are **23 years old or younger you are considered dependent** on your parents and their financial income and asset data and family information is used in our aid computation. The following are exceptions to the age definition would allow you to be considered independent:

- Be an orphan (both parents deceased), ward of the court, in foster care or was a ward of the court when 13 years or older;
- Be a veteran of the Armed Forces of the United States or serving on active duty for other than training purposes;
- Be a graduate or professional student;
- Be a married individual;
- Have legal dependents other than a spouse;
- Be an emancipated minor or in legal guardianship;
- Be a homeless youth;

There are times, though, when a student may not meet the above criteria. In that case, students need to reach out directly to the Student Financial Services Office at Carleton. Financial aid counselors can discuss whether or not a student **may qualify for a “dependency override”** which would treat a student as independent and exclude parental information from aid consideration. The following are some examples of circumstances that may be considered for a dependency override.

- an abusive family environment (e.g., sexual, physical, or mental abuse or other forms of domestic violence)
- abandonment by parents
- incarceration or institutionalization of both parents
- parents lacking the physical or mental capacity to raise the child
- parents whereabouts unknown or parents cannot be located
- parents hospitalized for an extended period
- an unsuitable household (e.g., child removed from the household and placed in foster care)
- married student’s spouse dies or student gets divorced

The following circumstances **do not merit a dependency override**, either alone or in combination:

- 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;
- The student is financially self-sufficient
- The student does not live with his or her parents
- The student is not claimed as an exemption on the parent's federal income tax returns
- The parents live in a foreign country

If you request consideration for a Dependency Override, you should consult with a financial aid counselor in the SFS Office. In most cases, we will **require the following documents**:

1. A signed detailed letter from you (student) outlining your unusual circumstances and rationale for being considered independent. This letter should also include how you plan to or are supporting yourself.

And, one or more of the following:

2. At least one detailed letter from a professional such as a teacher, guidance counselor, doctor, lawyer, minister explaining and supporting your request. This letter should provide first-hand information verifying your situation. It should be signed and include information for possible follow-up contact.
3. At least one letter from another adult such as a relative or person who is able to provide us with first-hand detailed information about your situation. Signature and contact information should also be included.
4. Any additional documents that would support your request.

Once the appropriate documents and materials are received, it will be reviewed by our Appeals Committee and a decision made. If we agree with a Dependency Override, a recalculation of your aid eligibility will be done using only your (student's) financial information and a revised aid award issued. If your request is denied, we will provide an explanation of the factors that did not meet our threshold for an Override. Dependency Overrides are rare at Carleton and consequently will take us more time than usual to consider each request. Our goal is to make the very best decision that is fair for the applicant and equitable for all aid recipients.