FINANCIAL INDEPENDENCE SUMMARY

In order to be classified as a resident for tuition purposes, a student must satisfy the University’s financial independence requirement in addition to physical presence and intent.

A. A student is considered to be financially independent if he/she meets all of the following criteria:

1. Is single; and
2. Was not claimed as a dependent for income tax purposes by his/her parents\(^1\) or any other individual for the two tax years immediately preceding the term for which classification as a resident is requested; and
3. Has been self-sufficient for two years.\(^2\) Self-sufficiency is defined as the ability to support oneself financially without the help of others. When determining self-sufficiency, money earned by the student through his/her own employment, financial aid and other loans\(^3\) obtained on his/her own credit, without a co-signer, will be considered acceptable sources of income. A student who receives payment for work performed must be able to document all income with appropriate W-2 forms/tax returns. Loans or gifts from relatives, associates or friends, regardless of the terms, are considered financial assistance and cannot be included as student income when determining self-sufficiency; non-institutional loans or gifts made at or near\(^4\) the time the student is enrolled in an institution will also be considered financial assistance. Funds that are given to the student by a relative, associate or friend through a college fund, savings, trust or other financial vehicle, will only be considered an acceptable form of income if the funds were established prior to the student’s 14\(^{th}\) birthday. “Bartering” for free room and board or other necessities is considered financial assistance. A student who has sufficient income to support him/herself, but who receives free room and board from a relative, associate or friend is not deemed totally self-sufficient as this is considered to be financial assistance.

B. The financial independence requirement will not be a factor in residence determination if the student meets one of the following criteria:

1. The student’s natural or adoptive parent(s), upon whom the student is financially dependent, meet the requirements for residency for tuition purposes; or
2. The student is at least 24 years of age by December 31 of the calendar year in which classification as a resident is requested; or
3. The student is a veteran of the U.S. Armed Forces; or
4. The student is a ward of the court or both parents are deceased; or
5. The student has a legal dependent other than a spouse or registered domestic partner; or
6. The student is married or has a registered domestic partner, or is a graduate or professional school student\(^6\), and was not claimed as an income tax deduction by his/her parents or any other individual for the tax year immediately preceding the quarter for which classification as a resident is requested; or
7. The student is a graduate or professional school student who is employed at UCSB 49% or more time (or awarded the equivalent in University-administered funds, e.g., fellowships, grants, stipends) during the term for which classification as a resident is requested; or
8. The student reached the age of majority in California while his/her parents were residents of California and the parents leave the state to establish a residence elsewhere and the student continues to be a resident of California after the parents’ departure. If the student is an adult when entering the state, the student must live with the California-resident parent(s) for 366 days and the student and parent(s) both must have established residence prior to the time the parents leave the state.

NOTICE: The student is cautioned that this summation is not a complete explanation of the laws regarding residence. Additional information is available from the Office of the Registrar. Changes may be made in the residence requirements between the publication date of this statement and the relevant residence determination date. Please refer any questions to the Residence Deputy at (805) 893-3033 or e-mail michael.basile@sa.ucsb.edu (rev. 3/11)

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\(^1\) “Parent”- The natural or adoptive father or mother; or, if both parents are deceased, the legal guardian. The term “parent” does not include step-parents unless expressly noted.

\(^2\) The two years used to demonstrate self-sufficiency are the two years immediately preceding the request for classification as a resident, not tax years.

\(^3\) With the exception of co-signed loans (e.g., parent PLUS loans).

\(^4\) The University considers “at or near” the time of enrollment in an institution to be after the student’s 14\(^{th}\) birthday, no exceptions.

\(^5\) Additional funds may not be added to the student’s account after his/her 14\(^{th}\) birthday, no exceptions.

\(^6\) Graduate or professional school student” includes graduate student instructors; graduate student teaching assistants; research assistants; junior specialists; post-graduate researchers; graduate student researchers and teaching associates; medical students and students enrolled in a teacher credential program.