



## Student Fellowships for Graduate School

Name: \_\_\_\_\_ Class Year: \_\_\_\_\_

Fellowship: \_\_\_\_\_

Mailing Address:  
(check mailed to this  
address) \_\_\_\_\_  
\_\_\_\_\_

Current email address: \_\_\_\_\_

According to our records, you are the recipient of a fellowship award through Hamilton College. Please provide the information listed above, a completed W-9 form (included) as well as a ***certified letter from the registrar of your graduate institution to confirm your enrollment***. It will take approximately two weeks to process your fellowship after we receive all of your information. We also feel it is our responsibility and in your best interest to explain to you the general treatment of these amounts for tax purposes.

Generally, under the tax laws, you should not have to pay taxes on a scholarship, fellowship, or stipend to the extent you use the funds for tuition, fees, books and equipment required for classes or enrollment. In other words, to what extent you use the funds for these types of expenses, the scholarship, fellowship or stipend award will determine how much should be excluded from your income for tax purposes.

However, any portion of a scholarship, fellowship or stipend award you spend on incidental expenses, including room and board, could be included in your taxable income for the year. Therefore, you may have to pay income taxes on the portion of a scholarship, fellowship or stipend award spent on items such as travel, research and medical insurance.

You should make the determination regarding whether a scholarship, fellowship or stipend award is taxable based upon your individual facts and accounting for all the scholarships, fellowships, or stipends that you may have received. To the extent that you determine that a portion of all of the funds are not subject to tax, you should retain receipts, cancelled checks, and other documentation that could show the total amount of your qualifying expenses.

Please note that this letter is intended to introduce you to the possible consequences of scholarships, fellowships, or stipend amounts. Since individual tax liability depends on each individual's circumstances, you should contact your personal tax advisor with any questions or concerns.

**Please return this form, a completed W-9 and arrange that a certified letter from your graduate institution be sent to:**

Kim Reale ([kreale@hamilton.edu](mailto:kreale@hamilton.edu))  
Dean of Faculty Office  
Hamilton College  
198 College Hill Road  
Clinton, NY 13323  
Phone: (315) 859-4881; Fax: (315) 859-4677

Blank W-9: <http://www.hamilton.edu/offices/business/forms/w-9-blank>