

Special Circumstances Form

Office of Financial Aid
Fall 2010 - Spring 2011

Student Name _____
Last First Middle

Phone _____ Social Security # - -

Email Address _____ Date _____

**Do not submit this form unless you have already filed
a 2010-2011 Free Application for Student Aid (FAFSA)
and received a copy of your results.**

Financial need is normally based on each student's or family's gross annual income for the previous tax year. If your income has recently decreased or you have special financial problems that were not taken into account on your FAFSA, we may be able to reevaluate your financial need based on your projected gross income for the 2010 tax year (January 1, 2010 to December 31, 2011). For dependent students, we consider students' and parents' incomes. For independent students, we only consider the student's and spouse's incomes. We will usually be able to notify you of the outcome of your request within 7-10 business days. If we are able to make adjustments, we will submit corrections to your FAFSA data. It usually takes 3-6 weeks to complete the correction process. If you qualify for additional aid based on your adjusted financial need, we will award the additional aid when the correction process is completed.

Ineligible Circumstances:

We can not make any adjustments for the following circumstances:

- Car payments or car insurance
- Consumer debt (credit cards)
- Chapter 7 personal bankruptcy
- Medical insurance premiums
- Mortgages and rent
- Home equity, IRA, 403B and 401K loans
- Parents will not help pay for college.
- Tuition paid for elementary/secondary private school

Instructions:

For the remainder of this form, if you are an independent student, you must only provide information for yourself and your spouse (if married). If you are a dependent student, you must provide information for yourself and your parent(s). If you are a dependent student, but think you should be independent, please discuss your situation with us.

Some special situations justify a Dependency Appeal.

Changes in Income: Part 1

Will gross 2010 income be less than 2009 income? Yes No

If yes, whose income decreased? (Check all that apply.)

Student Student's Spouse Student's Mother Student's Father

If income decreased, tell us why the income decreased and attach all of the required documents.

Reasons: (Check all that apply.)

Unemployment, reduced employment, or job change

Disability (Date of disability: _____)

Retirement

Separation or Divorce

Death of Spouse / Death of Parent

Reduced or Terminated Untaxed Income
(Social Security benefits, child support, alimony, etc.)

Received non-recurring income last year
(IRA or pension withdrawals, inheritance, moving allowances, etc.)

Other (_____)

Please discuss your situation with our office before you start collecting the required documents.

Required Documents: (We cannot process your request until you submit ALL required documents.)

- 1) Proof of situation. Examples include: unemployment benefit statement, retirement or termination notice, memo/letter from employer regarding change or reduction in employment, physician's disability statement, lawyer's statement regarding separation, court statements regarding divorce or termination of child support, social security benefit termination notice, death certificate, or termination of child support, social security benefit termination notice, death certificate, obituary notice.
- 2) Completed 2010 – 2011 Dependent or Independent Verification Worksheet.
- 3) After 12/31/2009, the student MUST submit a 2009 W2 & 1099 forms and signed copies of 2009 Federal Tax Returns for the student, and the parent(s) or spouse if the student is dependent or married. After 12/31/2009, you do not need to submit items 4 through 10.
- 4) Signed copies of the students' 2009 Federal Tax Returns.
- 5) Signed copies of the spouse's 2009 Federal Tax Returns (if the student is married).
- 6) Signed copies of the parents' 2009 Federal Tax Returns (if the student is a dependent).
- 7) Current pay stubs or earnings statements from any and all current employers.
- 8) If unemployment benefits were received, statement showing total benefits received.

Changes in Income: Part 2

You must complete this section.

Please carefully estimate your gross income and benefits for all of 2010.

(January 1, 2010 - December 31, 2011, gross means before any deductions.)

	Student	Spouse (if married)*	Parents (if dependent)*
Gross Wages, Salaries, Tips, and Severance Pay	\$ _____	\$ _____	\$ _____
Unemployment Benefits	\$ _____	\$ _____	\$ _____
Alimony / Support (Mandated or Voluntary)	\$ _____	\$ _____	\$ _____
Social Security Benefits	\$ _____	\$ _____	\$ _____
AFDC / TANF	\$ _____	\$ _____	\$ _____
Child Support Received	\$ _____	\$ _____	\$ _____

Any other untaxed income or benefits such as workers' compensation; disability; veteran's non-education benefits; or housing, food, and other living allowances provided to members of the military, clergy, and others:

Benefit Type _____	\$ _____	\$ _____	\$ _____
Benefit Type _____	\$ _____	\$ _____	\$ _____
Benefit Type _____	\$ _____	\$ _____	\$ _____

Note: If you or your parents are recently separated or divorced, do not include the former spouse's income or benefits.

Special Expenses: Unusually High Medical or Dental Expenses Not Covered by Insurance

Please discuss your situation with our office before you start collecting the required documents.

We can only make adjustments for these expenses if your expenses are greater than the standard estimates assigned by the federal formula. If your expenses are greater than the standard allotment, we can add the extra expenses to your cost of attendance. We can only consider expenses that will not be covered by insurance. Please provide the following information and documentation:

- 1) Total medical and dental insurance costs paid by you for 2009: \$ _____
- 2) Total medical and dental expenses not covered by insurance for 2009: \$ _____
- 3) Submit documents 2-4 from previous page. If you itemized your medical expenses, submit a copy of your 2009 Federal Tax Schedule A. If you didn't itemize, submit copies of receipts or billing statements for insurance costs and other medical and dental expenses.

