

## 2023-2024 Special Circumstances Financial Aid Appeal for Dependent Students

Student Name: \_\_\_\_\_ Student ID # \_\_\_\_\_

Address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Student Phone: \_\_\_\_\_ Student Email: \_\_\_\_\_

Parent Phone: \_\_\_\_\_ Parent Email: \_\_\_\_\_

### PLEASE READ BELOW BEFORE SUBMITTING THIS FORM

According to federal laws and regulations, a family's 2021 income is used to assess financial need for the 2023-2024 school year. If a family's 2022 income or projected 2023 income is significantly lower due to special circumstances, a financial aid administrator may be able to use the 2022 income or projected 2023 income to assess financial need.

If the 2023-2024 aid is based on estimated 2023 income, the student may be selected for verification in 2024-2025 to confirm the actual 2023 income. If the actual income is significantly more than the estimate, we will not process another request for the student in 2024-2025.

**Submission of this form in no way guarantees an adjustment to your financial aid and does not prevent the accrual of late fees on any unpaid student account balances.**

This request automatically requires Verification of the information reported on the FAFSA. In order to assess your situation and satisfy verification requirements, you must submit all items listed below along with this completed form.

**Failure to submit all required documentation will result in the appeal not being reviewed, so you should wait until you have the most accurate and complete information before submitting the appeal.**

### Section 1: Checklist for ALL appeals:

- Complete the 2023-2024 Dependent Verification Worksheet and remit with this form
- 2022 federal tax return transcript (or signed 1040 form) and all W-2 forms associated with the tax return for parent(s)
- 2022 federal tax return transcript (or signed 1040 form) and all W-2 forms associated with the tax return for student (if student filed)
- 2021 federal tax return transcript (or signed 1040 form) and all W-2 forms associated with the tax return for parent(s)
- 2021 federal tax return transcript (or signed 1040 form) and all W-2 forms associated with the tax return for student (if student filed)
- Select circumstance in Section 2
- A typed, signed letter detailing your circumstance

## Section 2: Special Circumstances for Consideration

Please check which Special Circumstance(s) apply to you. Any documentation listed as required but not submitted will result in your appeal not being reviewed. The Financial Aid Office reserves the right to request additional documentation not listed on this form. If you cannot check one of the boxes below, discontinue completing this form and contact the Financial Aid Office for assistance.

Special Circumstance		Required Documentation
<input type="checkbox"/> Loss of Employment Date of loss: _____	My parent has been unemployed <u>for at least 12 weeks</u> or has experienced a change in employment status which resulted in an income reduction for the 2022 tax year.	<ol style="list-style-type: none"> <li>1. Last paystub with year-to-date earnings for 2022 and latest paystub for 2023 with severance package (if received)</li> <li>2. Statement of Unemployment Benefits (if received)</li> <li>3. Documentation confirming separation of service (if applicable)</li> <li>4. Completion of Projected 2023 income chart (Section 3)</li> </ol>
<input type="checkbox"/> Loss of Taxable/Untaxed Income Date of loss: _____	Received benefits in 2021 have ceased or have been reduced for 2022.	<ol style="list-style-type: none"> <li>1. Documentation verifying the effective date of loss</li> <li>2. Completion of Projected 2023 income chart (Section 3)</li> </ol>
<input type="checkbox"/> Separation or Divorce Date of Sep/Divorce: _____	My parents have separated or divorced after completion of the FAFSA.	<ol style="list-style-type: none"> <li>1. Legal separation papers/divorce decree/letter from attorney</li> <li>2. Documentation of any child support/alimony to be received/paid per month</li> <li>3. Completion of Projected 2023 income chart (Section 3)</li> </ol>
<input type="checkbox"/> Death of Parent Date of death: _____	A parent has died after the completion of the FAFSA.	<ol style="list-style-type: none"> <li>1. Copy of Death Certificate</li> <li>2. Statement of Survivor Benefits</li> <li>3. Completion of Projected 2023 income chart (Section 3)</li> </ol>
<input type="checkbox"/> One-Time Income	One-Time income was received in 2021. May include a pension or IRA distribution, inheritance, or bonus.	<ol style="list-style-type: none"> <li>1. Documentation supporting one-time income</li> <li>2. Signed explanation of why one-time income is not available for educational purposes</li> </ol>

### Section 3: Projected Income and Benefits

Report all income you have earned in 2022, then estimate all 2023 income you expect to receive from the listed sources. **You must attach documentation of how you estimated your 2023 income and benefits.** This documentation may include recent pay stubs with year-to-date earnings, a letter from an employer stating your earnings to date, statement of unemployment compensation, etc.

Sources of Income	2022 Total Income	Income from January 1, 2023 to Today	Estimated Income January 1, 2023 to December 31, 2023
Parent 1 income earned from work (wages, salaries, tips, net business/farm income)	\$	\$	\$
Parent 2 income earned from work (wages, salaries, tips, net business/farm income)	\$	\$	\$
Other taxable income (severance pay, dividends, interest, pensions, annuities, alimony, unemployment compensation, early distributions from retirement, capital gains, rental/business income, etc.)	\$	\$	\$
Taxable Social Security Benefits	\$	\$	\$
Child Support Received for 2023	\$	\$	\$
Other untaxed income (Pre-tax pension contributions, tax-exempt interest/dividends, Worker's comp, payments to IRS, etc.)	\$	\$	\$
<b>TOTAL</b>	\$	\$	\$

**CERTIFICATION:** I certify that the information provided on this form is true and complete to the best of my knowledge. **I understand that if I do not provide ALL the required documentation and proof of the information on this form to the Financial Aid Office the student WILL NOT be evaluated for Special Circumstances.** I understand that outstanding charges must be paid by the due date regardless of submission of this form. By signing this sheet, I am stating that all steps of section 1 have been fully completed including all mandatory forms (i.e. Verification Worksheet, my signed statement detailing my circumstances, and all necessary tax transcripts and W-2 forms) and that any required documents are submitted with this form.

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_

Both signatures required. Electronic signatures not accepted.