

Special Circumstances Review 2009-2010
Dependent Student



You have indicated to the Financial Aid Office that you and/or your family have had a significant change in your financial situation during 2008 and/or 2009. The Financial Aid Office may be able to re-evaluate your eligibility for financial aid for the 2009-2010 academic year. This review will be based upon the information you provide through a process called *Special Circumstances Review*.

The *Special Circumstances Review* allows financial aid administrators to review and possibly alter data elements originally listed on your Free Application for Federal Student Aid (FAFSA) thereby altering your expected family contribution.

Circumstances which may result in the adjustment of your family contribution include, but are not limited to:

- ❖ Loss of untaxed income or benefits for at least 10 weeks. For example social security, child support or unemployment compensation
- ❖ Loss of earnings in 2008 or 2009 due to loss of a job, change in job, reduction in pay, disability, natural disaster, or involuntary retirement. Loss of overtime and voluntary retirement are NOT considered
- ❖ Loss of taxed income such as alimony
- ❖ Payment of alimony or divorce settlement to ex-spouse
- ❖ Payment of legal fees, back taxes, or sewer assessment in 2008 or 2009
- ❖ Costs associated with financial responsibility for maintaining two households due to involuntary relocation of parent's/ spouse's job due to economic cutbacks or plant closings, etc.
- ❖ Financial support for elderly relatives such as nursing home costs
- ❖ Payment of medical and dental expenses not covered by health insurance but paid by parent/student in 2008 and/or 2009.
- ❖ Separation, divorce, or death of a parent/spouse after the Free Application for Federal Student Aid (FAFSA) is filed

If you and your family meet one of the criteria listed above, or if you have been experiencing other extenuating circumstances that you would like us to take into consideration, please complete this application and submit the required documentation. Please note, this review does not guarantee a change in your financial aid eligibility, however it may. Your financial aid administrator will contact you if your aid will change.

Section I:

Student Name (print) _____

If you have not yet filed a 2009-2010 Free Application for Federal Student Aid (FAFSA), you must do first. **We are unable to give consideration to your circumstances until we have received the results from your FAFSA.**

Below, please give an explanation of the special circumstances (include dates when changes occurred):
(attach additional sheets if needed)

Section II:

Please provide anticipated income for the entire **2009 calendar year**. List the income that was received from January 1, 2009 until now in the first column. In the second column, please estimate the income that you anticipate receiving from now until December 31, 2009. Please total your columns when finished.

Parent INCOME FOR JANUARY 1, 2008 TO DECEMBER 31, 2008

Source Parent Information	Actual 1-1-09 to Today Today's date	ESTIMATED Today to 12-31-09	TOTAL (Actual + Estimated Columns)
Mother's income from work			
Father's income from work			
Taxable interest income			
Taxable pension / annuities			
Unemployment compensation			
Taxable portions of Social Security			
Alimony / Spousal support			
Untaxed portions of Social Security			
Welfare benefits or AFDC			
Untaxed pensions/annuities – exclude roll-overs			
Worker's Compensation			
Child support received			
IRA / KEOGH contributions			
Untaxed interest income			
Earned Income Credit			
Severance Pay			
Other _____ _____			
Increased Expenses			
<i>If you are requesting a review due to an increase in particular expenses in 2008 and/or 2009, please list the type below:</i>	<i>Actual: Amount paid, plus list year for which payment occurred</i>	<i>Estimated: Amount estimated you will pay from through December 31, 2009</i>	
<i>Expense:</i> _____	_____	_____	
_____	_____	_____	
_____	_____	_____	

Student Name: _____

SS# _____

Certification Statement: I certify that all of the information submitted and reported on this application to be true and complete to the best of my knowledge.

Student Signature

Date

Parent Signature

Date

Section III:

Special Circumstances that may result in the adjusting of your family contribution and the documentation required to process the special conditions are listed below. Please submit your documentation along with this Special Circumstances Application to the Financial Aid Office.

**** *If you have filed **taxes for 2008**, you **must** include a signed copy.*

Circumstance

Required Documentation

Loss of untaxed income/benefits for at least 10 weeks

Social Security

A copy of the social security termination letter and a copy of the most recent social security benefit letter

Child Support

The court or child services agency document stating the date of termination and the amount of monthly benefit

Unemployment Comp.

A copy of the unemployment compensation termination letter and a copy of the unemployment benefit letter

Worker's Comp.

A copy of the Worker's Compensation termination letter and documentation of the monthly benefit received

Loss of one-time income received

Withdrawal from Pension

A copy of your 2008 federal tax return and source of pension withdrawal.

Loss of earnings

Loss of job

A copy of your last pay stub, letter from prior employer indicating last day worked, copy of unemployment eligibility determination notice

Change in job (reduced pay)

A copy of your last pay stub from prior employer, a copy of your most recent pay stub from current employer, letter from current employer confirming new pay rate

Disability

A letter from a doctor confirming the disability & prognosis for returning to work, a letter from Social Security or an insurance agency stating the amount of monthly disability benefits

Loss of taxed income

Alimony

A copy of court documents stating the amount of monthly benefits received and the termination date of alimony received

Circumstance

Required Documentation

Payments made or debt incurred

Payment of legal fees

A letter from an attorney documenting the date of service and payments made

Back taxes

A letter from the IRS stating the amount owed and terms of repayment

Nursing home costs associated with dependent elderly relatives.

Copies of nursing home bills and copies of canceled checks documenting payments.

Medical/dental expenses not covered by health insurance buy paid by student/parent in 2008 and/or 2009.

Copies of canceled checks showing the amount of medical bills paid that were not covered by health insurance or a copy of your 2008 tax schedule A.

Death of a parent or spouse

A copy of the death certificate

Separation or divorce

Copy of divorce or legal separation papers or a letter from an attorney stating marital status or documentation confirming separate residences

Please provide any further documentation

******* When mailing your application for special circumstances, please remember to enclose this application, the 2009-2010 Verification Worksheet, your 2008 signed taxes (if filed), and the appropriate documentation.**



2009-2010 Verification Worksheet

Federal Student Aid Programs

Dependent

FORM APPROVED
OMB NO. 1845-0041

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with signed copies of your and your parent(s)' 2008 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

What you should do

1. Collect your and your parent(s)' financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet—you and at least one parent.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

A. Student Information

Last name	First name	M.I.	Social Security Number
Address (include apt. no.)			Date of birth
City	State	ZIP Code	Phone number (include area code)

B. Family Information

List the people in your *parent(s)' household*, including:

- yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2009 through June 30, 2010, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Missy Jones</i> (example)	<i>18</i>	<i>Sister</i>	<i>Central University</i>
		Self	

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20202-5345.

C. Student's Tax Forms and Income Information (all applicants)**Dependent**

1. Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your tax return.
- Check here if a signed tax return will be submitted to the school by _____ (date).
- Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 47 of the Free Application for Federal Student Aid (FAFSA).)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

D. Parent(s)' Tax Forms and Income Information

1. Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of their tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your parents' tax return(s).
- Check here if a signed tax return(s) will be submitted to the school by _____ (date).
- Check here if your parent(s) will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 95 of the FAFSA.)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If your parent(s) did not file and are not required to file a 2008 Federal income tax return, list below your parent(s)' employer(s) and any income they received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

E. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Date

Parent Date

Do not mail this worksheet to the Department of Education. Submit this worksheet to your Financial Aid Administrator at your school. Don't forget to sign your tax forms.