

2016-2017 SPECIAL CIRCUMSTANCES FORM - 7/15/2016 Deadline

Student Name: _____

ID Number: _____

EXPLANATION OF SPECIAL CIRCUMSTANCES:

Along with this form you must attach a signed, written statement detailing the specifics of your circumstances and provide any pertinent information that will help us better understand your particular situation.

SPECIAL CIRCUMSTANCES FOR CONSIDERATION:

Please check special circumstances that apply and submit all documentation required for each condition. Appeals will not be considered if you fail to include the required documentation. Please note that a student who has a zero EFC may not gain any additional financial aid eligibility.

Special Circumstances	Dependent Student	Independent Student	Required Documentation
<input type="checkbox"/> Loss of Employment Must be unemployed for at least 3 months.	You and/or your parent's income earned in 2016 will be less than that earned in 2015.	You and/or your spouse's income earned in 2016 will be less than that earned in 2015.	<ul style="list-style-type: none"> • Dependent or Independent Verification Worksheet • Signed 2015 IRS federal tax return transcripts for all via http://www.irs.gov • 2015 W-2 wage statements for all • Last pay stub showing year-to-date earnings • Termination notice from employer • Unemployment Benefit notice
<input type="checkbox"/> Other Loss of Income	You and/or your parent's received benefits in 2015 which has ceased or been reduced in 2016.	You and/or your spouse's received benefits in 2015 which has ceased or been reduced in 2016.	<ul style="list-style-type: none"> • Dependent or Independent Verification Worksheet • Signed 2015 IRS federal tax return transcripts for all via http://www.irs.gov • 2015 W-2 wage statements for all • Original 2015 benefit statement listing total amount received • Revised benefit statement listing updated amount to receive and effective date
<input type="checkbox"/> Separation or Divorce Separation/divorce must have occurred prior to FAFSA filing.	Your parents separated or divorced during 2015, but filed that FAFSA with both incomes.	You and your spouse separated or divorced during 2015, but filed that FAFSA with both incomes.	<ul style="list-style-type: none"> • Dependent or Independent Verification Worksheet • Signed 2015 IRS federal tax return transcripts for all via http://www.irs.gov • 2015 W-2 wage statements for all • Divorce decree or separation agreement and proof of separate residence. Documentation must show date of separation/divorce.
<input type="checkbox"/> Death of a Parent or Spouse	A parent passed away after filing the FAFSA.	Your spouse passed away after filing the FAFSA.	<ul style="list-style-type: none"> • Dependent or Independent Verification Worksheet • Signed 2015 IRS federal tax return transcripts for all via http://www.irs.gov • 2015 W-2 wage statements for all • Applicable death certificate
<input type="checkbox"/> Medical/Dental Expense Paid medical or dental expenses over 11% of Adjusted Gross Income (AGI).	Paid 2015 medical expenses by you or your parents were over 11% of AGI or anticipated expenses in 2016 are over 11% of AGI.	Paid 2015 medical expenses by you or your spouse were over 11% of AGI or anticipated expenses in 2016 are over 11% of AGI.	<ul style="list-style-type: none"> • Dependent or Independent Verification Worksheet • Signed 2015 IRS federal tax return transcripts for all via http://www.irs.gov - Must include Schedule A • 2015 W-2 wage statements for all • Copies of receipts (do not send bills) • Explanation of benefits statements • A detailed letter indicating amount of medical/dental expenses and when they were incurred.
<input type="checkbox"/> One Time (Lump Sum) Payment Requests for a one-time hardship withdrawal from pension and/or retirement account will only be considered once.	You or your parent received a one-time, lump sum payment in 2015.	You and/or your spouse received a one-time, lump sum payment in 2015.	<ul style="list-style-type: none"> • Dependent or Independent Verification Worksheet • Signed 2015 IRS federal tax return transcripts for all via http://www.irs.gov • 2015 W-2 wage statements for all • Documentation showing source and amount of lump payment. • A detailed letter indicating what these funds were used for and the balance remaining at this time.

PROJECTED INCOME AND BENEFITS FROM JANUARY 1, 2016 TO DECEMBER 31, 2016:

SOURCE OF INCOME:	FATHER/ STEPFATHER	MOTHER/ STEPMOTHER	STUDENT	STUDENT'S SPOUSE
Wages, Tips, Salary	\$	\$	\$	\$
Interest and/or Dividend Income	\$	\$	\$	\$
Unemployment Compensation	\$	\$	\$	\$
Worker's Compensation	\$	\$	\$	\$
Pensions and/or Annuities	\$	\$	\$	\$
Severance Pay	\$	\$	\$	\$
Retirement Benefits	\$	\$	\$	\$
Disability Benefits	\$	\$	\$	\$
Social Security Benefits (taxable)	\$	\$	\$	\$
Child Support	\$	\$	\$	\$
Alimony	\$	\$	\$	\$
Other: _____	\$	\$	\$	\$
TOTAL OF ALL INCOME:				

STATEMENT OF CERTIFICATION:

All of the information on this form is true and complete to the best of my knowledge. If requested, I agree to provide further documentation to substantiate the information provided. I understand that all special circumstances are reviewed on a case-by-case basis and this written request does not guarantee approval and/or may not ultimately result in a change of the financial aid already offered. Requests should allow approximately 4 weeks for processing time. While your request is being reviewed, students are advised to accept their current award package for billing purposes. This form only applies to Federal financial aid. It cannot be used to change state aid programs such as TAP or SUNY Tuition Credit. Decisions are final and will be communicated to the student.

Student's signature Date

Student's Spouse's signature (if applicable) Date

Parent's signature (if student is dependent) Date

HAVE YOU PROVIDED ALL OF THE FOLLOWING?

- ✓ Written detailed statement of circumstance
- ✓ Tax returns, all schedules and W-2 statements
- ✓ All required documentation as indicated
- ✓ Appropriate signatures on ALL forms including tax transcripts
- ✓ Student's name and ID number on all forms

THE FOLLOWING WILL NOT BE CONSIDERED FOR APPEALS:

- Discretionary personal expenses or consumer indebtedness (i.e., wedding expenses, credit card bills, car payments, etc.)
 - Bankruptcy
 - Retirement
 - Home equity, 401k, or 403b loans
 - Voluntary Unemployment or relocation
- Tuition paid for elementary or secondary school
 - Loss of overtime pay