



## 2017-18 Special Circumstances Form - 8/1/17 Deadline

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

The 2017-18 FAFSA requires families to provide income information from the 2015 tax year. If there has been a significant change in income since 2015, you may use this form to request a review of your current income situation. Check the box that pertains to you and submit all required documentation. Forms submitted without appropriate documentation will not be considered. You will also need to provide a signed cover letter that explains your change in circumstances and complete the Projected Income Section on the back of this form.

Adjustments will not be made if the student Expected Family Contribution (EFC) is zero or the reduced income is still too high for any increase in eligibility. Additional documentation may be requested.

Please indicate who the special circumstance pertains to: \_\_\_\_\_

Special Circumstance	Definition	Required Documentation
<input type="checkbox"/> Loss of employment greater than 3 months	Projected 2017 earnings from work will be significantly less than 2015	<ul style="list-style-type: none"> <li>• Last paystub showing year-to-date earnings</li> <li>• Documentation of loss of employment including begin date</li> <li>• Unemployment Benefits Statement</li> <li>• Signed 2015 IRS Tax Transcripts for all via <a href="http://www.irs.gov">http://www.irs.gov</a></li> <li>• Household List (Form E)</li> </ul>
<input type="checkbox"/> Other loss of income	Taxed or untaxed income such as child support or unemployment compensation will be less in 2017.	<ul style="list-style-type: none"> <li>• Signed 2015 IRS Tax Transcripts for all via <a href="http://www.irs.gov">http://www.irs.gov</a></li> <li>• Household List (Form E)</li> <li>• Documentation of loss of income/benefit such as revised child support agreement or revised benefits statement</li> </ul>
<input type="checkbox"/> Separation or Divorce	Divorce or separation occurred since filing the FAFSA.	<ul style="list-style-type: none"> <li>• Divorce/separation agreement or attorney letter.</li> <li>• Documentation of separate residences</li> <li>• Signed 2015 IRS Tax Transcripts for all via <a href="http://www.irs.gov">http://www.irs.gov</a></li> <li>• W-2 forms for both parties</li> <li>• Household List (Form E)</li> </ul>
<input type="checkbox"/> Death of a parent or spouse	Parent or spouse passed away since filing the FAFSA.	<ul style="list-style-type: none"> <li>• Death Certificate</li> <li>• Amount of any death benefits to be received</li> <li>• Signed 2015 IRS Tax Transcripts for all via <a href="http://www.irs.gov">http://www.irs.gov</a></li> <li>• 2015 W-2's</li> <li>• Household List (Form E)</li> </ul>
<input type="checkbox"/> Medical/Dental Expenses	Expenses paid out of pocket in exceeded 11% of 2015 AGI.	<ul style="list-style-type: none"> <li>• Signed 2015 IRS Tax Transcripts for all via <a href="http://www.irs.gov">http://www.irs.gov</a></li> <li>• Schedule A</li> <li>• Copies of paid receipts, not bills</li> </ul>
<input type="checkbox"/> One-time payment such as retirement account withdrawal or retroactive wages.	A lump sum payment was received in 2015 and will not be received again.	<ul style="list-style-type: none"> <li>• Signed 2015 IRS Tax Transcripts for all via <a href="http://www.irs.gov">http://www.irs.gov</a></li> <li>• Household List (Form E)</li> <li>• Documentation of one-time payment</li> <li>• Letter explaining what the funds were used for and the remaining balance of the payment</li> </ul>

**PROJECTED INCOME AND BENEFITS FROM JANUARY 1, 2017 TO DECEMBER 31, 2017:**

Source of Income	Father/Stepfather	Mother/Stepfather	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:	\$	\$	\$	\$
<b>TOTAL OF ALL INCOME</b>				

Do you plan to take out student loans for the 2017-2018 year? Yes \_\_\_\_\_ No \_\_\_\_\_

**Statement of Clarification:**

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 Spouses' Signature (if applicable)** **Date**

\_\_\_\_\_  
**Parent's Signature (if student is dependent)** **Date**

<p><b><u>HAVE YOU PROVIDED ALL OF THE FOLLOWING?</u></b></p> <p><input type="checkbox"/> Written detailed statement of Circumstances</p> <p><input type="checkbox"/> Tax Transcript, all schedules &amp; W2 Statements</p> <p><input type="checkbox"/> All required documentation as indicated</p> <p><input type="checkbox"/> Appropriate signatures on all forms including tax transcripts</p> <p><input type="checkbox"/> Student's Name and ID Number on all forms</p>
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**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
- Home equity, 401k, or 403b loans
- Voluntary Unemployment or relocation
- Tuition paid for elementary or secondary school
- Repeated retirement account withdrawals
- Retirement