

2019-20 Special Circumstances Form - 8/30/19 Deadline for Fall 2019

Student Name _____ Student ID # _____

The 2019-20 FAFSA requires families to provide income information from the 2017 tax year. If there has been a significant change in income since 2017, you may use this form to request a review of your current income situation. Check the appropriate box 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 2019 earnings from work will be significantly less than 2017	<ul style="list-style-type: none"> • Last paystub showing year-to-date earnings • Documentation of loss of employment including begin date • Unemployment Benefits Statement • 2017 IRS Tax Transcripts for student and parents in household via www.irs.gov • Household List (Form E)
<input type="checkbox"/> Other loss of income	Taxed or untaxed income such as child support or unemployment compensation will be less in 2019.	<ul style="list-style-type: none"> • 2017 IRS Tax Transcripts for student and parents in household via www.irs.gov • Household List (Form E) • Documentation of loss of income/benefit such as revised child support agreement or revised benefits statement
<input type="checkbox"/> Separation or Divorce	FAFSA information does not reflect current marital status or income. <i>Note:</i> Recent non-legal separations are subject to a six-month waiting period.	<ul style="list-style-type: none"> • Divorce/separation agreement or attorney letter • Documentation of separate residences • 2017 IRS Tax Transcripts for student and parents in household via www.irs.gov • 2017 W-2 statements for all tax filers • Household List (Form E)
<input type="checkbox"/> Death of a parent or spouse	Parent or spouse passed away since filing the FAFSA.	<ul style="list-style-type: none"> • Death Certificate • Amount of any death benefits to be received • 2017 IRS Tax Transcripts for student and parent via www.irs.gov • 2017 W-2 statements • Household List (Form E)
<input type="checkbox"/> Medical/Dental Expenses	Expenses paid out of pocket exceeded 11% of 2017 AGI.	<ul style="list-style-type: none"> • 2017 IRS Tax Transcripts for student and parents in household via www.irs.gov • Schedule A (Form 1040) • Copies of paid receipts, not bills
<input type="checkbox"/> One-time payment such as retirement account withdrawal or retroactive wages.	A lump sum payment was received in 2017 and will not be received again.	<ul style="list-style-type: none"> • 2017 IRS Tax Transcripts for student and parents in household via www.irs.gov • Household List (Form E) • Documentation of one-time payment • Letter explaining what the funds were used for and the remaining balance of the payment

*** Photocopy of signed Tax Return Form 1040 is acceptable in lieu of IRS Tax Transcripts.**

PROJECTED INCOME AND BENEFITS FROM JANUARY 1, 2019 TO DECEMBER 31, 2019:

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				

Do you plan to take out student loans for the 2019-2020 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 may not result in a change of the financial aid already offered. Requests should allow approximately 4 weeks for processing time and they do not extend the payment deadline for billing purposes. I understand this form only applies to Federal financial aid and it cannot be used to change state aid programs such as TAP, SUNY Tuition Credit, or Excelsior. 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><u>HAVE YOU PROVIDED ALL OF THE FOLLOWING?</u></p> <p><input type="checkbox"/> Written detailed statement of circumstances</p> <p><input type="checkbox"/> Tax Transcript, all schedules & W-2 Statements</p> <p><input type="checkbox"/> All required documentation as indicated</p> <p><input type="checkbox"/> Appropriate signatures on all forms</p> <p><input type="checkbox"/> Student's Name and ID Number on all forms</p>

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 -Lottery/Gambling winnings
- Tuition paid for elementary or secondary school -Repeated retirement account withdrawals -Retirement