

Student Name _____ Student ID # _____

The 2023-2024 FAFSA requires families to provide income information from the 2021 tax year. If there has been a significant change in income since 2021, use this form to request a review of your current income situation. Forms submitted without appropriate documentation will not be considered. **You will need to provide a signed cover letter that explains your change in circumstances and complete the Projected Income/Benefits section of this form.** If you or your family have documented, COVID-19 caused loss of income, resulting in an educational expense that is no longer accurately reflected in your calculated Cost of Attendance (COA), you can submit a special circumstances COA Appeal. If that situation applies to you, please document and describe in detail the COA budget component that needs to be considered for a potential adjustment and increase in financial aid award funds. Additional documentation may be requested.

Please indicate who the special circumstance pertains to: _____

Special Circumstance	Definition	Required Documentation
<input type="checkbox"/> Loss of income or <u>employment in 2022</u> (wages/employment, alimony, child support, retirement/pension, taxed social security, worker's compensation)	Income and/or benefits in 2022 were significantly less than in 2021	<ul style="list-style-type: none"> • Documentation of loss of employment showing begin date and revised benefits statement(s) • Unemployment Benefits Statement • 2021 & 2022 signed Tax Return 1040 with all schedules for student and parents • 2021 & 2022 W-2 wage statements for student and parents • Last paystub showing year-to-date earnings • Household List (Form E)
<input type="checkbox"/> Loss of income or <u>employment in 2023</u> (wages/employment, alimony, child support, retirement/pension, taxed social security, worker's compensation)	Projected income and/or benefits in 2023 will be significantly less than in 2022	<ul style="list-style-type: none"> • Documentation of loss of employment showing begin date and revised benefits statement(s) • Unemployment Benefits Statement • 2021 & 2022 signed Tax Return 1040 with all schedules for student and parents • 2021 & 2022 W-2 wage statements for student and parents • Last paystub showing year-to-date earnings • Household List (Form E)
<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 • 2021 signed Tax Return 1040 with all schedules for student and parents • 2021 W-2 statements for student and parents • 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 • 2021 signed Tax Return 1040 and all schedules • 2021 W-2 statements for all • Household List (Form E)
<input type="checkbox"/> Medical/Dental Expenses	Expenses paid out-of-pocket exceeded 11% of 2021 AGI.	<ul style="list-style-type: none"> • 2021 signed Tax Return 1040 with all schedules for student and parent • 2021 W-2 statements for all • Copies of all out-of-pocket paid expenses (not bills) for 2021
<input type="checkbox"/> One-time payment such as retirement account withdrawal or retroactive wages.	A lump sum payment was received in 2021 and will not be received again.	<ul style="list-style-type: none"> • 2021 signed Tax Return 1040 with all schedules for student and parent • Documentation of one-time payment • Letter explaining what the funds were used for and the remaining balance of the payment • Household List (Form E)

PROJECTED INCOME AND BENEFITS FROM JANUARY 1, 2023 TO DECEMBER 31, 2023:

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 2023-2024 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 (required 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 Documents, 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 2023-2024 priority document submission deadline is May 1, 2023 for Fall 2023 and October 1, 2023 for Spring 2024. Submitting documents after the priority deadline may result in limited funding.

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