



2011-2012 Request for Consideration of Special Circumstances

When you completed the 2011-12 Free Application for Federal Student Aid (FAFSA), it provided us your financial situation at the time you completed the form. We know that sometimes there are special circumstances that are not reflected on the FAFSA. When appropriate and sufficient documentation is provided, it might be possible to take these circumstances into account through a process called Professional Judgment (PJ). Be aware that a PJ is performed at the discretion of each institution and does not guarantee an increase in financial aid.

PLEASE INDICATE BELOW THE SPECIAL CIRCUMSTANCE THAT APPLIES TO YOUR SITUATION:

**For all circumstances, please attach a letter explaining your family's special circumstances.*

**Also, complete the attached verification worksheet and submit signed copies of you (and your spouse's) and your parent's (if dependent) 2010 federal income taxes with W-2s, if you have not already done so.*

- ___ 1. Unusual or excessive medical expenses not covered by insurance incurred and paid in 2010. As a general rule, these expenses should be at least 15% of your Adjusted Gross Income (AGI) before submitting documentation.

Documentation Required:

- Schedule A of 1040 tax form **OR**
- Copies of cancelled checks or statements showing amount paid (please total all items)

- ___ 2. Involuntary reduction in parent, student or spouse employment income for at least 10 weeks in 2011. As a general rule, the projected 2011 Adjusted Gross Income (AGI) should be at least 20% less than the actual 2010 AGI before submitting documentation.

Documentation Required:

- Your last pay stub
- Statement from previous employer indicating last day of employment
- If receiving unemployment compensation, a copy of your benefits determination

- ___ 3. Complete loss of non-taxable income, such as child support, worker's compensation and veteran's benefits, for at least 10 weeks in 2011.

Documentation Required:

- Written statement from appropriate agency showing loss of benefit and termination date

- ___ 4. Your parents, or you and your spouse, have become legally separated or divorced after submission of your original FAFSA.

Documentation Required:

- Copy of legal divorce decree or separation order
- Date of separation/divorce: ___/___/___

- ___ 5. Your spouse or parent has died after the submission of your original FAFSA.

Documentation Required:

- Copy of death certificate

- ___ 6. Atypical one-time taxable earning such as a capital gain, 401K disbursement or moving expenses reflected on 2010 federal income taxes

Documentation Required:

- Statement indicating nature of earnings and proof as to what the funds were used for

- ___ 7. Tuition expenses at an elementary or secondary school incurred and paid in 2010. As a general rule, these expenses should be at least 15% of your Adjusted Gross Income before submitting documentation.

Documentation Required:

- Copy of paid tuition statements
- Letter from school(s)
- Cancelled checks (please total checks)

- ___ 8. Parent's 2011-12 out-of-pocket tuition expenses for at least half-time enrollment at a college/university.

Documentation Required:

- Copy of parent's paid tuition statements
- Copy of parent's class registration for fall 2011 and spring 2012 (projected)

EXPECTED 2011 INCOME
(January 1, 2011 – December 31, 2011)

If you checked sections 2-6 on the front of this form, please complete this income section and include documentation supporting your amounts. Otherwise, skip this section and **sign and date the form below**.

Please do your best to give estimates of the items requested below and submit the documentation to support these amounts.

2011 Expected Income	Father (for dependent students)	Mother (for dependent students)	Student	Spouse (if student is married)
<u>TAXABLE INCOME</u>				
Income earned from work	\$	\$	\$	\$
Unemployment compensation	\$	\$	\$	\$
Business, farm or rental income	\$	\$	\$	\$
Dividends, interest, capital gains, etc.	\$	\$	\$	\$
Any other taxable income (please itemize)	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
<u>UNTAXED INCOME</u>				
Retirement plan contributions made in 2011 (401K, 403b, IRA, etc.)	\$	\$	\$	\$
Child support received	\$	\$	\$	\$
Workman's compensation	\$	\$	\$	\$
Disability (not Social Security)	\$	\$	\$	\$
Any other untaxed income (please itemize)	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
<u>TOTAL EXPECTED 2011 INCOME</u>	\$	\$	\$	\$

Make sure you return the following to the Financial Aid Office:

- This form completed
- The attached Verification Worksheet (if you have not already submitted one to our office)
- Signed 2010 federal income taxes, including Schedules C & F, if applicable, and W-2 forms (if you have not already submitted them to our office)
- A signed letter explaining the family's special circumstances

If you later realize your estimates were not accurate, you are required to notify us of the correct estimates if they are significantly different than what you originally reported on this form.

All of the information on this form is true and complete to the best of my knowledge. I agree to give proof of all appeal information requested. I understand that this request does not guarantee an increase in aid. Decisions are made on a case-by-case basis for the current academic year only.

Student Signature

Date

Spouse/Parent Signature

Date

Student Name (please print)

Student ID

C. Tax Forms and Income Information

1. If you, your parents or your spouse **did not, and were not required** to, file a 2010 Federal Income Tax return, check the appropriate box(s) below. List the employer(s) and any income from work received in 2010.

You (did not file)

Your Spouse (did not file)

Your Parents (did not file)

Name of Employer	Student Amount	Spouse or Parent(s) Amount
	\$	\$
	\$	\$
	\$	\$

For those who did file taxes, you must submit W-2 forms and a signed copy of the 2010 Federal Income Tax return, including Schedules C and/or F if applicable, for the following people:

Independent Students

- Yourself
- Your parent(s)

Independent Students

- Yourself
- Your spouse (if you filed taxes separately)

2. Both tax filers and non-tax filers must list any amounts received in 2010 – See questions 43&44/ 91&92 of FAFSA.

2010 Untaxed Income Do not leave any blanks; use zero "0" or N/A if not applicable.

Other Sources of 2010 Year Income	Student (& Spouse)	Parent(s)
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) as reported on W-2 Form Box 12a-12d, codes D, E, F, G, H & S. Include untaxed portions of 401(k) & 403 (b) plans.	\$	\$
Child support received for all children (don't include foster care or adoption payments)	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others	\$	\$
Money received or paid on your behalf (e.g. bills), not reported elsewhere on this form	\$	\$
Veteran's non-educational benefits	\$	\$
Workman's compensation	\$	\$
Disability – (not Social Security)	\$	\$
Other: (please list)	\$	\$

2010 Additional Financial Information Do not leave any blanks; use zero "0" or N/A if not applicable.

2010 Year	Student (& Spouse)	Parent(s)
Child support paid because of divorce or separation (don't include support for any children listed in section B of this worksheet)	\$	\$
Taxable earnings from Federal Work-Study (not Campus Job) or other need-based work programs*	\$	\$
Student grant, scholarship, fellowship and assistantship aid, including AmeriCorps awards, that was reported as income on your tax return (this is not the Education Credit or amount from your 1098T tax form)	\$	\$
Combat pay or special combat pay that was reported as income on your tax return	\$	\$

* If you had work-study earnings in 2010, refer to the letter sent from Carroll at the beginning of the spring 2011 semester or call the Financial Aid Office to get this amount

D. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign.

Student's Signature

Date

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

Parent's Signature (Dependent Students Only) Date