

## STUDENT FINANCIAL AID INCOME REDUCTION EVALUATION

2019-2020

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Last Name	First Name	M.I.
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Date of Birth	SS#	SID#
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Home Phone Number \_\_\_\_\_ Work Phone Number \_\_\_\_\_

The Higher Education Act provides authority for the financial aid administrator to exercise discretion in a number area based on special circumstances. Special circumstance is the ability of a financial aid administrator to review a student's financial aid based on unusual circumstances. These special circumstances are conditions that differentiate an individual student from a class of students rather than conditions that exist across a class of students.

**You must complete Step One and Step Two.**

### STEP ONE

#### Unemployment or Change of Employment Status:

**Check the Appropriate Line:**

Student     Spouse     Father     Mother

**Documents Required:**

Letter from previous and or current employer (**on company letterhead**) stating:

- Last date of employment
- Reason for unemployment
- 2017 earnings up to the last date of employment
- 2018 earnings up to the last date of employment
- 2019 earnings up to the last date of employment
- Statement from Unemployment Office regarding Unemployment Benefits
- Retirement Pay statement

**NOTE:** You must be unemployed for at least eleven (11) weeks.

**Divorce/Legal Separation:**

Student/Spouse     Father/Mother

**Documents Required:**

- A copy of the divorce decree OR a letter from the attorney verifying the separation date.
- 2017 W-2's and 2017 federal tax return for student or supporting parents.
- 2018 W-2's and 2018 federal tax return for student or supporting parents.

**Death**

\_\_\_ Spouse    \_\_\_ Father    \_\_\_ Mother

Documents Required:

- A copy of the death certificate and obituary.
- 2017 W-2's and 2017 federal tax return of student or surviving parent.

**Disability**

\_\_\_ Student    \_\_\_ Spouse    \_\_\_ Father    \_\_\_ Mother

Documents Required:

- A letter from the physician stating the nature and date of the disability.
- Documents supporting Social Security benefits expected in 2018.

**Loss of benefits and or untaxed income**

\_\_\_ Student    \_\_\_ Spouse    \_\_\_ Father    \_\_\_ Mother

Documents Required:

- Documentation certifying loss of a benefit or untaxed income.

**One-time income (examples: inheritance, IRA distribution, retroactive lump sum Social Security payments).**

\_\_\_ Student    \_\_\_ Spouse    \_\_\_ Father    \_\_\_ Mother

Documents Required:

- Documentation of one-time income including amount and type

**STEP TWO**

Estimated income for the 2019 calendar year January 1 through December 31, 2019

**Note: Write in zero (0) if any item does not apply**

**Taxable Income**

\_\_\_ Student    \_\_\_ Spouse    \_\_\_ Father    \_\_\_ Mother

Person Affected: \_\_\_\_\_ Person Affected: \_\_\_\_\_

Wages	\$ _____	\$ _____
Unemployment benefits	\$ _____	\$ _____
Pensions	\$ _____	\$ _____
Alimony	\$ _____	\$ _____
Other taxable income	\$ _____	\$ _____

**Nontaxable Income**

Social Security	\$ _____	\$ _____
TANF	\$ _____	\$ _____
Child Support	\$ _____	\$ _____
Untaxed income	\$ _____	\$ _____
Current Cash and Savings	\$ _____	\$ _____

\_\_\_\_\_  
Parent Signature (for dependent student only)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature (Both signatures required if married)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

**\*\*PLEASE NOTE: THIS PROCESS DOES NOT GUARANTEE FINANCIAL AID ELIGIBILITY\*\***

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