



2023-2024 SPECIAL CIRCUMSTANCE FORM

Student Name: _____ Student AU ID#: _____

PLEASE READ BELOW BEFORE SUBMITTING THIS FORM.

According to federal laws and regulations, a family’s 2021 income is used to assess financial need for the 2023-2024 academic year. We appreciate that the Free Application for Student Aid (FAFSA) may not present an accurate picture of your unique financial situation and resources available. If a family’s 2022 or 2022 income is significantly lower due to special circumstances, a financial aid administrator may be able to use the 2022 or 2023 income to assess financial need.

This Special Circumstance Form allows you to supplement your FAFSA information or document any financial circumstances that have changed or arisen since your 2023-2024 FAFSA was filed. The Assumption University Financial Aid Appeals Committee will reevaluate your eligibility for additional federal, state or institutional aid in the context of the information you provide. Our financial aid staff may require further documentation and will work with your family to make sure you are receiving the fullest consideration for aid eligibility while adhering to federal, state, and institutional policies and guidelines.

Please check which Special Circumstance(s) apply to you (listed on the next page). *Any documentation listed as required but not submitted will cause a delay in reviewing your request.* Forms in **bold font** below can be found on the Office of Financial Aid website www.assumption.edu/FAforms.

Please keep in mind:

- The student/parent must complete the FAFSA and be admitted to the University and have received their official financial aid offer from the Office of Financial Aid before a review can take place.
- Filing this form does not guarantee an adjustment to your financial aid offer.
- Students who do not utilize their full Federal Direct Loan funds in prior years will not be considered for additional institutional funding; they will only be considered for additional Federal and State financial aid.
- The re-evaluation of your financial aid offer could result in a reduction of your financial aid funding.
- If your FAFSA was selected for [federal verification](#), you must complete that process before your appeal is reviewed.
- Decisions of the Appeals Committee are final. Further appeals will be reviewed when newer information or circumstances arise.

Special Circumstances do not include the following:

- Student or parent(s) who does not wish to borrow to cover educational expenses
- Parent(s) refusal to contribute to educational expenses
- Parent(s) payment of student loans for older sibling
- Expenses such as credit card debt, wedding expenses, sports, enrichment activities, etc.

CERTIFICATION: I certify that the information provided on this form is true and complete to the best of my knowledge. I understand that if I do not provide ALL the required documentation and proof of the information on this form to the Office of Financial Aid, the student CANNOT be evaluated for Special Circumstances. Due to the number of submissions we receive, we are unable to follow up on incomplete files. Once all documents are received please allow at least 10 business days for processing.

I understand that outstanding charges must be paid by the due date regardless of submission of this form. By signing this sheet, I am stating that all sections of this form have been fully completed including all mandatory forms, i.e. Verification Worksheet and IRS Data Retrieval, and any required documents are submitted with this worksheet.

Parent’s Signature _____ Date _____

Student’s Signature _____ Date _____

SPECIAL CIRCUMSTANCE FORM

Student Name: _____ Student AU ID#: _____

SELECT ALL THAT APPLY	IF...	THEN PLEASE SUBMIT THE FOLLOWING DOCUMENTATION
<input type="checkbox"/> Loss of Employment/Reduction in Income in 2022 <ul style="list-style-type: none"> • Wages/ Self-Employment Income • Alimony • Child Support • Retirement/Pension • Social Security (taxed) • Worker's Compensation • <p>Date of loss: _____</p>	<p>Your parents' 2022 income will be less than their earned 2021 income (dependent student)</p> <p>Your spouse's 2022 income will be less than their earned 2021 income (independent student)</p>	<input type="checkbox"/> 2021 IRS Data Retrieval <u>or</u> signed 2021 Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> 2021 IRS Data Retrieval <u>or</u> signed 2021 Tax Return 1040 and all schedules. <input type="checkbox"/> 2022 W-2 wage statements for all. <input type="checkbox"/> 2022 most recent paystub showing year to date earnings for both parents. If self-employed please provide your most recent quarterly business tax statement. <input type="checkbox"/> Letter from employer documenting date of unemployment or reduction in wages. <input type="checkbox"/> If loss of employment or reduction in wages, please complete the Unemployment Form-2022 <input type="checkbox"/> Income & Expense Clarification Form <input type="checkbox"/> Dependent Student Verification Worksheet <u>or</u> Independent Student Verification Worksheet
<input type="checkbox"/> Loss of Employment/Reduction in Income in 2023 <ul style="list-style-type: none"> • Wages/ Self-Employment Income • Alimony • Child Support • Retirement/Pension • Social Security (taxed) • Worker's Compensation <p>Date of loss: _____</p>	<p>Your parents' 2023 income will be less than their earned 2021 income (dependent student)</p> <p>Your spouse's 2023 income will be less than their earned 2021 income (independent student)</p>	<input type="checkbox"/> 2021 IRS Data Retrieval <u>or</u> signed 2021 Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> 2022 signed 2022 Tax Return 1040 and all schedules. <input type="checkbox"/> 2023 W-2 wage statements for all. <input type="checkbox"/> 2023 most recent paystub showing year to date earnings for both parents. If self-employed please provide your most recent quarterly business tax statement. <input type="checkbox"/> Letter from employer documenting date of unemployment or reduction in wages. <input type="checkbox"/> If loss of employment or reduction in wages, please complete the Unemployment Form-2022 <input type="checkbox"/> Income & Expense Clarification Form <input type="checkbox"/> Dependent Student Verification Worksheet <u>or</u> Independent Student Verification Worksheet

<input type="checkbox"/> Separation/Divorce	<p>Your parents separated or divorced after filing 2021 taxes (dependent student)</p> <p>You and your spouse separated or divorced after filing 2021 taxes (independent student)</p>	<input type="checkbox"/> 2021 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> Divorce decree/separation agreement or proof of separate addresses. <input type="checkbox"/> Documentation showing division of all other income shown on tax return. <input type="checkbox"/> Income & Expense Clarification Form <input type="checkbox"/> Dependent Student Verification Worksheet or Independent Student Verification Worksheet
<input type="checkbox"/> One-time (lump sum) payment received	<p>A one-time, lump sum payment was received in 2021</p>	<input type="checkbox"/> 2021 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> Verification of Rollover- 1099-R (if applicable)
<input type="checkbox"/> Death of a Parent (dependent student) <input type="checkbox"/> Death of a Spouse (independent student)	<p>A parent or spouse passed away in 2021</p>	<input type="checkbox"/> 2021 Signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> 2021 IRS Data Retrieval or signed 2021 Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statement. <input type="checkbox"/> Documentation showing division of all other income shown on tax return. <input type="checkbox"/> Applicable death certificate. <input type="checkbox"/> Income & Expense Clarification Form <input type="checkbox"/> Dependent Student Verification Worksheet or Independent Student Verification Worksheet
<input type="checkbox"/> Unusual Medical/Dental Expenses	<p>You have unusual paid medical or dental expenses (not covered by insurance) in either 2021 or 2022</p>	<input type="checkbox"/> 2021 & 2022 Signed Tax Return 1040 as applicable and all schedules including Schedule A. <input type="checkbox"/> Credit card statements, receipts marked paid or statements from the medical provider listing all payments
<input type="checkbox"/> Other circumstance not listed	<p>You have a change in financial circumstance not listed</p>	<input type="checkbox"/> Statement explaining the change in financial situation <input type="checkbox"/> 2021 & 2022 Signed Federal Tax Return 1040 and all schedules <input type="checkbox"/> Other documentation that demonstrates the financial change

