

2026-2027 Special Circumstance Request – Independent

Student Name: _____ **Student ID:** _____

Submitting an appeal does not guarantee an adjustment will be made to your financial aid package.

Special consideration may be available if your current financial situation is not accurately reflected by the 2024 tax information reported on your FAFSA. You must submit a signed detailed letter explaining the situation and all required documentation as outlined below. All documents must be completed and received before the Special Circumstance Committee will review the request. **Please use black or blue ink.**

Checklist for ALL appeals:

- Student (and spouse) 2025 Federal Tax Return (signed), Schedule 1 and 3 (if applicable)
- Signed letter detailing circumstance
- Student (and spouse) most recent paystub(s)

Section A: Criteria for Consideration *Check all circumstances you would like to be considered and submit required documentation. The documentation listed below is not an inclusive list. Additional information may be requested on a case-by-case basis.*

Death of spouse

Name of Deceased: _____ Date of death: ____/____/____

- Death Certificate or Obituary
- Student's 2024 Federal Tax Return (signed), Schedule 1 and 3 (if applicable)
- Student's 2024 W2s

Student's divorce/separation

Date of divorce/separation: ____/____/____

Number in student's family: _____ (include yourself, any dependent children, and other people living with you)

- Divorce Decree or letter from attorney OR proof of separate residences
 - utility bills, mortgage statements, rental agreement etc.
- Student's 2024 Federal Tax Return (signed), Schedule 1 and 3 (if applicable)
- Student's 2024 W2s

Student (or spouse) is retired, unemployed for at least 8 weeks, or has a change in employment resulting in an income reduction

Relationship: _____ Date: ____/____/____

- Unemployment Documentation (if applicable)
- Documentation of situation

Loss of benefits, such as unemployment, disability, social security, veterans, child support, or alimony

Relationship: _____ Date: ____/____/____

- Documentation of situation

Non-recurring payments received during the FAFSA tax year will not be repeated

Type of Income: _____ Date: ____/____/____

- Documentation of situation

Section B: Income

Complete the Gross Taxed Income and the Untaxed Income sections below for your family's expected income prior to exemptions, adjustments, or deductions. Include all estimated income from January 1, 2026 to December 31, 2026.

Please include estimates for the full year.
If none, enter zero.

Total 2026 Gross Taxed Income

1. Wages, salaries, tips, severance pay
2. Business or farm income (self-employment)
3. IRA distributions, pensions, and annuities
4. Alimony
5. Unemployment Compensation
6. Other taxed income (specify) _____

Student Income

\$ _____
\$ _____
\$ _____
\$ _____
\$ _____
\$ _____

Spouse Income

\$ _____
\$ _____
\$ _____
\$ _____
\$ _____
\$ _____

Total 2026 Gross Taxed Income

\$ _____ \$ _____

Total 2026 Untaxed Income

1. IRA deductions and payments to self-employed SEP, SIMPLE, and other qualified plans
 - 1040 Schedule 1, total of lines 16 + 20
2. Untaxed portion of IRA distributions
 - 1040 line 4a minus 4b
3. Untaxed portion of pensions and annuities
 - 1040 line 5a minus 5b
4. Foreign earned income exclusion
 - 1040 Schedule 1, Line 8d

\$ _____ \$ _____
\$ _____ \$ _____
\$ _____ \$ _____
\$ _____ \$ _____

Section C: Signature

I hereby certify that all information contained in this request is true and complete to the best of my knowledge. I understand that all special circumstances are reviewed on a case-by-case basis and the submission/review of this form does not guarantee a change in the student's financial aid eligibility.

Student Signature Date

Spouse Signature Date

Electronic signatures will not be accepted.