



<u>Doe</u> Student Last Name	<u>John</u> First Name	<u>M.</u> MI	<u>Saint Martin's</u> ID Number	<u>000000000</u> Example: 000123456
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SPECIAL CIRCUMSTANCES APPEAL - INDEPENDENT Academic Year 2023-2024

Directions: If you have extenuating circumstances that the standard federal formula of analyzing need does not consider, please complete this form and return it to our office. Processing time for these appeals can be up to four weeks.

In order to verify your income prior to adjusting it based on the circumstances you indicate below, **you will need to submit a Standard Verification Form (V1) along with your appeal.** This includes 2021 IRS Tax Transcripts if you did not use the IRS Data Retrieval Tool when you completed the FAFSA and a 2022 IRS Tax Transcript or signed 2022 Tax Return with all schedules. **You must also include a personal statement in the space provided. Incomplete appeals will not be processed, please include all requested items.**

Part A. Student Information	
Current mailing address (street, apartment or PO Box number, city, state, ZIP code, country) 5000 Abbey Way SE SMU BOX #123 Lacey, WA 98503	Phone (include area code) 123-456-7890

Part B. Type of Special Circumstance	
<input checked="checked" type="checkbox"/>	Check all that apply and submit the required documents. This includes a personal statement.
<input type="checkbox"/>	<p>Retirement:</p> <ol style="list-style-type: none"> 1. Letter of separation from employer, 2. Copy of last pay stub showing earnings, 3. Statement of retirement benefits, 4. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 5. V1 Independent Verification Form, 6. Complete a written statement explaining your circumstance.
<input type="checkbox"/>	<p>Death of a Parent/Spouse:</p> <ol style="list-style-type: none"> 1. Copy of death certificate or obituary notice with dates after FAFSA was filed, 2. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 3. Copy of 2021 and 2022 W2s for surviving parent, 4. V1 Independent Verification Form, 5. Complete a written statement explaining your circumstance.
<input type="checkbox"/>	<p>Loss of Employment due to Layoff or Termination:</p> <ol style="list-style-type: none"> 1. Letter on employer company letterhead with last date of employment, 2. Proof of severance/buy-out package and year-to-date income, 3. Copy of unemployment benefits OR statement of ineligibility, 4. Copy of last pay stub showing earnings, 5. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or IRS Tax Transcripts, 6. V1 Independent Verification Form, 7. Complete a written statement explaining your circumstance.
<input type="checkbox"/>	<p>Change in Employment Status, from full-time to part-time, or reduction in wages:</p> <ol style="list-style-type: none"> 1. Letter on employer company letterhead with the change effective date, 2. Documentation of year-to-date income, 3. If you reduced work hours to attend school, provide a statement to explain, 4. Copy of last pay stub showing earnings, 5. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 6. V1 Independent Verification Form,

	7. Complete a written statement explaining your circumstance.
	<p>Loss of Other Income from child support, etc.:</p> <ol style="list-style-type: none"> 1. Letter regarding ending payments from parent paying child support, 2. Statement from the Court, including stop dates and amounts, 3. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 4. V1 Independent Verification Form, 5. Complete a written statement explaining your circumstance.
	<p>Non-recurring income - IRA or pension distribution, inheritance, etc.:</p> <ol style="list-style-type: none"> 1. Documentation of income type and amount, 2. Documentation of how the funds were spent or invested, 3. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 4. V1 Independent Verification Form, 5. Complete a written statement explaining your circumstance.
	<p>Marital separation or divorce after the FASFA was filed:</p> <ol style="list-style-type: none"> 1. Copy of divorce decree or documentation of separation (Separate Maintenance Agreement or attorney's letter), 2. Proof of separate residences, 3. Explanation of when divorce will be filed and when separation started, 4. Documentation verifying child support you are receiving for minor children, 5. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 6. Copy of 2021 and 2022 W2s for custodial parent, 7. V1 Independent Verification Form, 8. Complete a written statement explaining your circumstance.
	<p>Private School K-12 Tuition: Letter from the child's school stating the 2022-23 tuition minus scholarships/discounts; which identifies the child by name and a written statement explaining the request..</p>
	<p>Non-reimbursed Medical/Dental Expenses:</p> <ol style="list-style-type: none"> 1. Documentation of medical/dental expenses for 2022 or 2023 2. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts with itemized deduction worksheet if applicable. 3. V1 Independent Verification Form, 4. Complete a written statement explaining your circumstance.
	<p>Other:</p> <ol style="list-style-type: none"> 1. Supporting documentation related to your request. 2. Signed Copies of 2021 and 2022 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts. 3. V1 Independent Verification Form, 4. Complete a written statement explaining your circumstance.

Part C. Required – Statement of Explanation (Attach separate sheet if needed.)

Thorough explanation of how the loss of a parent / spouse affects financial need and overall situation.

Part D. Certification

You must sign this form certifying that the information you provided is true. Misrepresentation of facts in connection with this form may be sufficient cause, in and of itself, for cancellation or repayment of financial aid, whenever discovered.

Student Signature

Date

X

John M. Doe

08/01/2023

Scan the QR Code below to turn in your documents via Secure Drop Box





Student Last Name

First Name

MI

Saint Martin's
ID Number

Example: 000123456

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Academic Year 2023-2024

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Phone (include area code)

Part B. Type of Special Circumstance

(✓)

Check all that apply and submit the required documents. This includes a personal statement.

Retirement:

1. Letter of separation from employer,
2. Copy of last pay stub showing earnings,
3. Statement of retirement benefits,
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Loss of Employment due to Layoff or Termination:

1. Letter on employer company letterhead with last date of employment,
2. Proof of severance/buy-out package and year-to-date income,
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