2017-2018 Dependent Student Special Circumstance Form

Student’s Name: ___________________________  Luther ID: __________________

Parent Name(s): ____________________________

Parent(s) daytime phone number: __________________________

Parent(s) email address: __________________________

STEP 1: REASON FOR FILING - Check the box for circumstance(s) that apply to you and submit the additional documentation as indicated for that circumstance. Be sure to review the second page.

☐ Loss of Employment, Reduced Wages

Current parent wages are at least 10% less than in 2015 due to loss of job, change in employment, reduction in hours, or reduction in pay. Job losses will be considered after 30 days of unemployment.*

☐ Signed 2016 Parent Federal Tax Return or Tax Return Transcript from the IRS

☐ Last check stub(s) from previous and/or current employers, if applicable, for parents listed on the FAFSA

☐ Individuals with self-employment or other non-W2 income from the tax return need to document their financial changes in Step 2 of this form

☐ Letter from previous employer stating last date of employment

☐ Benefit or denial letter from unemployment. Benefit letter needs to include weekly and maximum benefit amounts.

☐ Severance information, if applicable

*We reserve the right to request a more recently filed tax return at a later date.

☐ Marital Separation / Divorce

Parents must live in separate residences

☐ Most recent signed Parent Federal Tax Return or Tax Return Transcript from the IRS

☐ Documentation of separation, divorce, or verification of separate residences

☐ Most recent W-2 of custodial parent

☐ Documentation of child support, family support or maintenance support. Include support that is received or anticipated.

☐ High Medical/Dental Expenses

Eligible expenses are limited to medical and dental expenses not reimbursed through insurance or employer-sponsored cafeteria plans (HRA, HSA, health care flexible spending account, etc.). As a general rule, these expenses would need to exceed $3,500 before they would have the potential to impact a financial aid award.

☐ 2016 Signed Parent Federal Tax Return or Tax Return Transcript from the IRS

☐ Copy of Schedule A from the 2016 Federal Tax Return, if filed

☐ If expenses were not claimed on Schedule A, submit a listing of eligible expenses you paid out-of-pocket in 2016

☐ Last check stub(s) from employer for parent(s) listed on FAFSA (if a Schedule A is not submitted)

☐ Loss of Benefits

Student/Parent has lost some or all benefits

☐ Submit official documentation of benefit(s) lost
Step 2: Explanation of the Circumstance (Attach additional sheet if necessary) - REQUIRED

- **One-Time Income**
  - 2015 Signed Parent Federal Tax Return or Tax Return Transcript from the IRS
  - Provide documentation (if available) or an explanation and dollar amount of any one-time income received and what was done with that income

- **Private Elementary/Secondary School Tuition**
  - Submit tuition statement OR letter from the school indicating tuition charges minus financial aid and/or discounts for child(ren) at that school during the 17-18 academic year.

- **Education Loan Payments**
  - Signed 2016 Parent Federal Tax Return or Tax Return Transcript from the IRS
  - Provide current bills showing the minimum monthly loan payment due on all federal loans held by either parent or for private student loans held or co-signed by either parent on behalf of other children

- **Other Unusual Expenses**
  - Provide explanation and documentation of expense(s)
  - Examples of eligible expenses: Dependent care, elderly care, funeral expenses, legal expenses, etc. Consumer debt is not eligible for consideration under special circumstances.

Note: All appeals for the 2017-18 academic year must be submitted by March 1, 2018.

Step 3: CERTIFICATION - I certify that the information accompanying this form is complete and correct to the best of my knowledge. If additional documentation is required, I will submit such documentation or my Special Circumstance Request will be denied. I also understand that if I give false or misleading information, I may be fined, jailed, or both. I understand that the Financial Aid Office may later request copies of my 2016 Federal Tax Transcripts or other documentation to verify the information submitted for my 2017-18 special circumstances request and adjustments may be made to my financial aid award at that time.

Parent signature Date

Student signature Date

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