## Luther College

### 2017-2018 Independent Student Special Circumstance Form

**Student’s Name:** ___________________________  **Luther ID:** __________

**Student Phone:** ___________________________

**Student 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 student 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 Student and/or Spouse Federal Tax Return or Tax Return Transcript from the IRS
- □ Last check stub(s) from previous and/or current employers, if applicable, for student and spouse (if married)
- □ 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

Student/Spouse must live in separate residences

- □ Most recent signed Student and/or Spouse Federal Tax Return or Tax Return Transcript from the IRS
- □ Documentation of separation, divorce, or verification of separate residences
- □ Most recent W-2 of student
- □ 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, heath 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 Student and/or Spouse 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 (if a Schedule A is not submitted)

#### □ Loss of Benefits

Student and/or Spouse has lost some or all benefit(s)

- □ Submit official documentation of benefit(s) lost

---

*Note: The content above is a partial representation of the form. For a complete and accurate form, please refer to the original document.*
Step 2: Explanation of the Circumstance (Attach additional sheet if necessary) - REQUIRED

☐ One-Time Income
☐ 2015 Signed Student and/or Spouse 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

☐ 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 Returns 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.

Student signature  Date