2018-2019 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 2016 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.

☐ Most recent signed 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

☐ Loss of Benefits

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

☐ Submit official documentation of benefit(s) lost

☐ Marital Separation / Divorce

Student/Spouse must live in separate residences

☐ Most recent signed Student 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, health care flexible spending account, etc.). As a general rule, these expenses would need to exceed $3,000 before they would have the potential to impact a financial aid award.

☐ 2017 Signed Student and/or Spouse Federal Tax Return or Tax Return Transcript from the IRS

☐ Copy of Schedule A from the 2017 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 2017

☐ Last check stub(s) from employer (if a Schedule A is not submitted)
Step 2: Explanation of the Circumstance (Attach additional sheet if necessary) - REQUIRED

- **One-Time Income**
  - 2016 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 18-19 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 usually ineligible for consideration under special circumstances.*

Note: All appeals for the 2018-19 academic year must be submitted by March 1, 2019.

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 2017 Federal Tax Returns or other documentation to verify the information submitted for my 2018-19 special circumstances request and adjustments may be made to my financial aid award at that time.

Student signature  Date