

LUTHER COLLEGE

2023-2024 Dependent Student Special Circumstance Form

Student's Name: _____ Luther ID: _____

Parent Name(s): _____

Parent(s) daytime phone number: _____

Parent(s) email address: _____

This form should be completed when a family can document a significant change in financial circumstances, or if you believe there are special circumstances that were not included/considered on your initial FAFSA. You will be notified by email regarding the outcome of your appeal after your information is reviewed by the Luther College Financial Aid Office.

The completion of this form does not guarantee an adjustment to a student's financial aid award.

Please answer the following questions, attaching an additional page if more space is needed. Please note, if individuals disclose a report of sexual misconduct, the Financial Aid Office staff are required to consult with the Title IX Coordinator to ensure your safety, your access to available resources, and other relevant considerations.

Part A. Submit all of the following:

1. A written statement explaining what caused the change(s) in your family's circumstances
2. A signed copy of your most recent federal tax return (for 2021 federal tax return please include Schedules 1-3 (as applicable) along with Schedules A, C, E, and/or F (as applicable) and W-2 Form(s). If submitting a 2022 federal tax return please include Schedules 1-3 (as applicable) along with Schedules A, C, E and /or F (as applicable).
3. W2 Forms from the same year as the tax return submitted.
4. Documentation of your change in circumstance(s). See next page for a list of documents commonly needed for specific circumstances

Part B. Check ALL that apply to you:

- Loss of employment or change of employment status for student or parent(s)
- One-time payment reflected on 2021 taxes that created an unusual increase in income
- Divorce or separation **after** filing the 2023-24 FAFSA
- Death of parent **after** filing the 2023-24 FAFSA
- Loss of Untaxed Income (child support, pension, etc.)
- Unusually high medical/dental expenses not covered by insurance or pre-tax medical savings/spending account
- Private elementary or secondary school tuition for sibling
- Education Loan Payments made by parents for themselves
- Incorrect financial information provided on initial application
- Other: _____

Part C. Carefully read the following before signing this form:

I/we understand that submission/review of this form does not guarantee a change in the student's financial aid eligibility. It is the student's responsibility to remain in good standing with the Financial Services and Registrar's offices. I/we affirm that the information provided in my appeal and the attached documentation is accurate and complete to the best of my/our knowledge. I/we understand that if any of the information used in my appeal changes, I must contact the Financial Aid Office immediately in writing with the corrected information. I/we understand that future financial aid awards may be reduced if income estimates are significantly underestimated in my appeal. I understand that false statements or misrepresentations may be cause for denial, reduction, withdrawal or repayment of financial aid.

Parent signature

Date

Student signature

Date

(Continue on Back)

ACCEPTABLE DOCUMENTATION FOR PART A:

1. Loss of employment, or change in employment status

- Signed statement from the parent explaining reason(s) for unemployment
- Year-to-date pay stubs showing all income earned from work for 2022 (and 2023, if applicable)
- Documentation of all untaxed income received in 2022 (and 2023, if applicable)
- Termination letter and/or any documentation regarding severance pay
- Documentation of any unemployment benefits, disability benefits, retirement benefits, or insurance payments being received or expected to be received (if eligible to receive any of these benefits, amounts must be known before you can submit this form).

2. Divorce or separation (requires that parents live in separate households)

- Divorce: Copy of divorce decree (include custody and child support agreements)
- Separation: Copy of legal separation document (include custody and child support agreements); or, if legal separation document is not yet available, a signed statement from your attorney or unrelated third party showing the date of separation
- Parent most recent W2's if taxes were filed jointly
- Statement confirming parents are in separate residences.
(Proof of different addresses on billing statements)

3. Death of parent

- Copy of death certificate or an obituary notice
- Documentation of proceeds of estate distributions including: inheritance, insurance, pensions and Social Security benefits that you have received or expect to receive

4. Loss of untaxed income

- Court documentation stating the last date of child support received
- Letter from the agency providing the benefits, detailing termination of benefits
- Statement from the agency that summarizes the amounts of the benefits already received

5. Unusual medical or dental expenses not covered by insurance or a health care flexible spending account (As a general rule, these expenses would need to exceed \$3,000 before they would have the potential to impact a financial aid award.) We will not consider expenses paid in 2023.

- Copy of Schedule A from federal tax return
- If the Schedule A is not available or the expense was paid in 2022, other documentation must be provided. This could include bills, insurance statements, canceled checks, or other proof of the amounts **PAID** by the family. In addition to this documentation, you must include your total expenses paid in your written statement.
- Copy of parent(s) most recent paystub

6. Private elementary or secondary school tuition

- Copy of billing statement from the school, including all financial aid and scholarships received

7. Educational Loan Payments

- Copy of current bill showing minimum monthly 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

8. Other documentation/circumstances

- Any relevant documentation that will support request for reconsideration. If you need clarification on what to provide, please contact the Financial Aid Office

Luther College Financial Aid Office: PH: 563.387.1018 PH: 800.458.8437 finaid.luther.edu

Document Submission Options

Secure Document Upload Portal: liquidfiles.luther.edu/filedrop/Financial-Aid (requires the student's 7-digit Luther ID) or

FAX: 563.387.2241 or EMAIL: finaid@luther.edu or US MAIL: 700 College Drive, Decorah, IA 52101-1045
