

Athens State ID: \_\_\_\_\_ Student's First Name: \_\_\_\_\_ Last: \_\_\_\_\_



## Financial Aid Special Circumstances Form 2021-2022 Academic Year

This form can be used to report changes that could affect the 2021-2022 Free Application for Federal Student Aid (FAFSA). Follow the steps below and return this form with the appropriate documentation to the Office of Student Financial Aid. Once the information is reviewed, you will be notified of the decision. All decisions are final. All documentation is required to be submitted together. Information will not be accepted after initial submission unless requested by the Office of Student Financial Aid.

### Required Documents:

1. A detailed letter documenting the facts of your circumstance(s)
2. A signed copy of your (and your spouse's if applicable or parent's if dependent) most recent tax return(s) and all appropriate schedules.
3. Any documents listed in **Section B** that are applicable after your selection

### Section A – Student Information

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Athens State Email: \_\_\_\_\_

Contact Number: \_\_\_\_\_

**Complete if Dependent Student:** Information of Parent(s) included on your FAFSA:

Mother's (Stepmother's) Name:

Father's (Stepfather's) Name:

Parent(s) contact number:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List the people in your household, including yourself. List the name of the college for any member who will attend college at least half-time between 07/01/2021 and 06/30/2022.

Full Name	Age	Relationship	College
		Self	Athens State University

## Section B – Student Information

From the list provided, mark the reason for the requested review of your family's financial situation and provide the listed documentation

**Loss of a Job, or Parental Loss of Job**

- Provide Separation/Termination Notice or documentation from employer showing effective date of termination
- Provide Documentation of severance package (if one exists)
- Provide Statement of Unemployment Benefits and effective dates

**Loss of Untaxed Income**

Loss of Social Security Benefits

- Provide notification of termination of benefits

Loss of Child Support

- Provide court documentation stating the date of termination of benefits and prior amount(s)

Loss of Worker's Compensation

- Provide appropriate official documentation stating date of termination of benefits and prior amount(s)

**Loss of Taxable Income**

Loss of Alimony

- Provide court documentation stating the date of termination of benefits

Loss of Unemployment Benefits

- Provide appropriate letter from the unemployment office stating date of termination of benefits

Other: please specify and provide appropriate documentation

**Excessive Medial Expenses** [*payments made out-of-pocket beyond what insurance covers. Do not include insurance premium costs*]

- Provide all bills showing the expenses
- Provide proof of personal payment of the expenses in question (check stubs, receipts, etc.)

**Lump Sum (one-time) income** [*this could include inheritance, moving expense allowance, lump sum retirement payments, etc.*]

- Provide Appropriate documentation identifying the income in question and how the funds were spent or invested

**Change in Marital Status**

- Provide document that states the date of change (e.g. divorce decree)

**Other Circumstances**

- Please list

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### Section C – Income and Asset Information Assessment

Please complete the table below to help us assess your actual income for 2021. Report all income you expect to receive through December 31, 2021 in the appropriate boxes. You must include documentation supporting all income. This documentation could include but is not limited to:

- Recent pay stubs showing year-to-date earnings (since January 1, 2021)
- A letter from your employer stating total 2021 projected and or actual earnings
- W-2 Forms

#### Student Income and Asset Information

Income Resources	ACTUAL 2020 Gross Income	ESTIMATED 2021 Gross Income
Income earned from work for <b>Student</b>		
Income earned from work for <b>Spouse</b> (if applicable)		
Other taxable income (interest, pensions, unemployment, etc.)		
Other untaxable income (workers compensation, housing allowance, etc.)		
<b>Totals:</b>		

Please list your current asset information (if any of the following are applicable):

*Net Worth means market value of the asset minus the debt on the asset*

- Current amount of cash, savings, and checking: \$ \_\_\_\_\_
- Current net worth of real estate/investments (other than home): \$ \_\_\_\_\_
- Current net worth of farm or business: \$ \_\_\_\_\_

#### Parent Income and Asset Information (For Dependent students only)

Income Resources	ACTUAL 2020 Gross Income	ESTIMATED 2021 Gross Income
Income earned from work for <b>Parent 1/Father/Stepfather</b>		
Income earned from work for <b>Parent 2/Mother/Stepmother</b>		
Other taxable income (interest, pensions, unemployment, etc.)		
Other untaxable income (workers compensation, housing allowance, etc.)		
<b>Total:</b>		

Please list your Parent's current asset information (if any of the following are applicable):

*Net Worth means market value of the asset minus the debt on the asset*

- Current amount of cash, savings, and checking: \$ \_\_\_\_\_
- Current net worth of real estate/investments (other than home): \$ \_\_\_\_\_
- Current net worth of farm or business: \$ \_\_\_\_\_

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## Section D – Certification and Signature

My signature on this document confirms my acknowledgement of the following:

- I agree to provide proof of the information if and/or when requested.
- The information submitted for review is true and correct to the best of my knowledge.
- Providing false information may result in reduced eligibility, repayment of aid, or both.
- Underestimating the projected income could result in reduced eligibility, repayment of aid, or both in this year or next.
- I have read each section, provided the required documentation, and realize that more information may be required.
- During peak seasons, processing times may be delayed.
- The signatures provided are true and not typed

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse of Student Signature \_\_\_\_\_ Date \_\_\_\_\_  
(If Applicable)

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_  
(If Applicable)

### FOR INTERNAL OFFICE USE ONLY

\_\_\_\_\_ Student Not Eligible

\_\_\_\_\_ Special Circumstances  
Adjustment Request Denied

\_\_\_\_\_ Special Circumstances  
Adjustment Request Approved

Comments \_\_\_\_\_

\_\_\_\_\_

FA Administrator \_\_\_\_\_

Date \_\_\_\_\_

#### Office of Student Financial Aid

Athens State University

300 N. Beaty Street

Athens, AL 35611

Phone: 256-233-8122 / Fax: 256-233-8178

Email: [finaid@athens.edu](mailto:finaid@athens.edu)