

## Special Circumstance Form 2008-2009



2065 Half Day Road · Deerfield, Illinois 60015 · USA

### Dependent

Federal Student Aid Regulations provide the potential for reevaluation if your financial circumstances change. The 2007 income information that you reported on your financial aid application may not be an accurate indicator of your ability to pay for educational costs. Your parents must meet one of those circumstances indicated below to qualify for reevaluation of your financial aid eligibility.

Once you have completed all steps below, return this form along with the **required supporting documentation** to the Trinity International University Financial Aid Office. Submission of this form does not guarantee a change in your financial aid eligibility. Each case will be evaluated on an individual basis.

### Step I: Student Information

Name \_\_\_\_\_ Date \_\_\_\_\_  
Last First MI  
Permanent Address \_\_\_\_\_  
Number and Street (including Apt. No.) City State Zip Code  
Social Security Number \_\_\_\_\_ Phone \_\_\_\_\_

### Step II: Reason for Filing a Special Circumstance Form

Check (✓) the circumstance that applies to your situation. Required documentation to support your parents' circumstance **must be attached**.

- A. Your parent(s) earned money in 2007 but has lost his/her full-time job in the last ten (10) weeks and is still unemployed.

**Required Documentation:**

- Statement from ALL previous employer(s) your parent worked for in 2007 and/or 2008 on company letterhead indicating:
  - Date your parent ceased employment
  - Total earnings for the ENTIRE year of 2007
  - Wages for 2008 (if employment ceased in 2008); and
- A current statement of unemployment benefits received.
- Copy of your parents' 2007 federal 1040 tax return.

- B. Your parent(s) earned money in 2007 but has changed employment and is currently earning substantially less money in 2008.

**Required Documentation:**

- Statement on company letterhead from ALL employers your parent worked for in 2007 and/or 2008 indicating:
  - Dates of employment
  - Parent's estimated earnings for 2008
- 2007 W-2 form(s)
- Copy of your parents' 2007 federal 1040 tax return.

- C. Your parent(s) received unemployment compensation or some other taxed or untaxed income or benefit for at least ten (10) weeks in 2007 but has completely lost that income or benefit.

**Required Documentation:**

- Statement of termination from the source of income. *Include* dates he/she received the benefits.  
\*NOTE: Income and benefits include such things as: Social Security benefits, court-ordered child support, retirement or disability benefits. Don't include loss of veteran's educational benefits; and

- A statement from the source of the income or benefit indicating the dates your parent received the income benefit and the estimated income or benefit received in 2007.
- Copy of your parents' 2007 federal 1040 tax return.

- D. Since you applied for financial aid for 2008-2009, your parents have separated or divorced.

**Required Documentation:**

- Copy of your parents' 2007 federal 1040 tax return;
- Copy of both parents' 2007 W-2 form(s); and
  - If parents are separated:** Attach a notarized statement indicating the dates of your parents' separation.
  - If parents are divorced:** Attach a copy of your parents' divorce decree.

- E. Since you applied for financial aid for 2008-2009, a supporting parent has died.

**Required Documentation:**

- Copy of your parent's death certificate;
- Copy of your parent's 2007 federal 1040 tax return; and
- Copy of both parent's 2007 W-2 form(s).

- F. Your parents received a one-time income in 2007, such as Social Security payment, inheritance, IRA, or pension distribution.

**Required Documentation:**

- Copy of your parents' 2007 federal 1040 tax return;
- Statement from source of one-time income indicating amount; and
- Statement from your parents indicating the disposition of the funds.

G. Your parents paid out (not owed) a large amount of medical and/or dental expenses in 2007.

Total Medical and Dental Expenses Paid in 2007

\$ \_\_\_\_\_

**Required Documentation:**

1. Copy of your parents' 2007 federal 1040 tax return
2. Copy of your parents' 2007 federal income tax Schedule A; and
3. Copies of the medical and dental payments not covered by insurance that they have already paid.

H. Your parents paid private or parochial elementary and/or secondary tuition in 2007.

Total Tuition Paid in 2007: \$ \_\_\_\_\_

**Required Documentation:**

1. Copies of paid receipts for private or parochial elementary and/or secondary tuition; or
2. A statement from the education institution indicating tuition paid in 2007.
3. Copy of your parents' 2007 federal 1040 tax return

**Step III: Your Family's Expected Income in 2008**

(Note: If you checked items D, E, F, G, or H, skip Step III and complete Step IV.)

1. In 2008, how much will your father earn from work? \$ \_\_\_\_\_
2. In 2008, how much will your mother earn from work? \$ \_\_\_\_\_
3. In 2008, what will be the amount of your parents' tax deductible IRA and/or Keough? \$ \_\_\_\_\_
4. In 2008, how much will your father receive in Unemployment Compensation? \$ \_\_\_\_\_
5. In 2008, how much will your mother receive in Unemployment Compensation? \$ \_\_\_\_\_
6. In 2008, how much will your parents receive in Child Support? \$ \_\_\_\_\_
7. In 2008, how much will your father receive in Workers' Compensation? \$ \_\_\_\_\_
8. In 2008, how much will your mother receive in Workers' Compensation? \$ \_\_\_\_\_
9. In 2008, how much will your father receive in Social Security benefits? \$ \_\_\_\_\_
10. In 2008, how much will your mother receive in Social Security benefits? \$ \_\_\_\_\_
11. In 2008, how much will your parent(s) earn in AFCD or ADC? \$ \_\_\_\_\_
12. In 2008 how much will your parent(s) receive in other untaxed income, such as earned income credit, housing, food, and other living expenses from military, clergy, and others? (Include cash payments and cash value benefits.) \$ \_\_\_\_\_

**Step IV: Read, Sign and Return to Trinity Financial Aid Office**

*Certification:* All the information on this form and the attached documents is true and correct to the best of my knowledge. If asked by an authorized official, I agree to give additional proof of the information that I have given on this form. I realize that this proof may include a copy of federal or state tax returns. I also realize that if I do not give proof when asked, the Special Circumstance will not be reviewed.

Student Signature \_\_\_\_\_ Parent Signature \_\_\_\_\_

Date Completed \_\_\_\_\_ **Is your required documentation attached?**

**OFFICE USE ONLY**

APPROVED  DENIED Date \_\_\_\_\_ Staff Signature \_\_\_\_\_  2<sup>nd</sup> Check By: \_\_\_\_\_

Reason for Denial \_\_\_\_\_