



Student's Name: _____ SLU Banner ID Number _____
Last First

2008-2009 Special Circumstance Review

Parent(s)/Stepparent(s) and Student/Spouse may use this form to report significant changes that have occurred since filing the 2008-2009 Free Application for Federal Student Aid (FAFSA). **The Office of Student Financial Services must have the results of a valid FAFSA prior to the review of any special circumstances.** The review of special circumstances is handled on a case by case basis. Please allow 2-4 weeks for review and notification. Changes resulting from this review do not guarantee an increase in aid. You must complete all questions on this form and provide all requested documentation. **If requested documentation is not attached or items are missing or left blank, this form will be returned to you unprocessed.** If clarification of your situation is necessary, this office may request additional information or documentation beyond the requested items below.

Submit signed copies of parent/stepparent and/or student/spouse signed 2007 federal tax returns, including all schedules, attachments and W-2s and an Institutional Verification Form (included within this form). These documents are required to be on file with the Office of Student Financial Services prior to review. Review of this information does not guarantee any change of awards. Each situation and any resulting changes are determined based on a case by case analysis.

The office will consider reductions in income or unusual circumstances that significantly and negatively affect your ability to contribute to the student's SLU cost of attendance. It is our policy **not to consider** a reduction in income for the following:

- Unusual expenses related to personal living (e.g., wedding expenses, credit card bills, home mortgage, school loan payments, car payments, legal expenses or other miscellaneous consumer item expenses).
- Reductions in overtime pay or one time winnings (this will be reflected on the following year's aid applications).

| | Reason | Requested Documentation |
|--------------------------|--|---|
| <input type="checkbox"/> | <p>Loss/Change in Employment</p> <p><i>Must be at least a 20% decrease in the family's household income and continuous for 10+ weeks.</i></p> | <ul style="list-style-type: none"> ✓ Letter or notification from employer concerning loss of job or change in job status. ✓ Is there a severance package? <ul style="list-style-type: none"> ○ Yes___ Provide documentation and amount. ○ No___ Provide letter from employer indicating no severance package is to be given. ✓ Copy of last pay stub for 2008. ✓ Will you receive or are you receiving unemployment benefits? <ul style="list-style-type: none"> ○ Yes___ Provide documentation and amount. ○ No___ ✓ Has the person returned to work? <ul style="list-style-type: none"> ○ Yes___ Give start date and pay stub. ○ No___ ✓ Complete Section B |



| | | |
|--------------------------|---|---|
| <input type="checkbox"/> | <p>Death of Spouse or Parent</p> | <ul style="list-style-type: none"> ✓ Copy of death certificate ✓ Are there survivor benefits (social security, life insurance, etc)? <ul style="list-style-type: none"> ○ Yes___ Provide documentation. ○ No___ Provide separate letter indicating no benefits are to be received. ✓ Complete Section B |
| <input type="checkbox"/> | <p>Divorce or Separation</p> | <ul style="list-style-type: none"> ✓ Copy of divorce decree or separation agreement. (If you do not have a separation agreement, attach a notarized statement indicating separation and effective dates.) ✓ Income/Asset Settlements ✓ List of current household members, relationship to student, and their age ✓ Complete Section B |
| <input type="checkbox"/> | <p>One-Time Income <i>Reductions in overtime pay or one-time winnings are not considered.</i></p> | <ul style="list-style-type: none"> ✓ Give source and amount of income and include an explanation of why these funds are not available for educational purposes. ✓ Attach a copy of your signed 2006 (in addition to the 2007) Federal Tax Return. |
| <input type="checkbox"/> | <p>Loss of Benefits (Child Support, Social Security, Unemployment)</p> | <p>Child Support:</p> <ul style="list-style-type: none"> ✓ Attach a copy of Court or Child Service Agency documents stating benefit ending date and monthly amount received. <p>Social Security:</p> <ul style="list-style-type: none"> ✓ Attach a copy of notification of loss of social security income stating benefit ending date and monthly amount received. <p>Unemployment Benefits:</p> <ul style="list-style-type: none"> ✓ Attach a copy of notification of loss of unemployment income stating benefit ending date and monthly amount received. |
| <input type="checkbox"/> | <p>Healthcare Expenses</p> <p>The following condition is only considered if the expense exceeds 15% of the family's adjusted gross income.</p> <p>Medical costs may be allowed if required treatment, rather than elective care and documented by a physician.</p> | <ul style="list-style-type: none"> ✓ Attach a copy of your and/or parents' Schedule A of the 2007 Federal Income Tax Return or copies of PAID receipts or canceled checks incurred through 2007. ✓ Attach a letter of explanation of healthcare expenses incurred. |
| <input type="checkbox"/> | <p>Tuition Expenses</p> <p>The following condition is only considered if the expense exceeds 10% of the family's adjusted gross income.</p> <p>Substantial elementary/secondary tuition expenses paid for dependents other than the SLU student.</p> | <ul style="list-style-type: none"> ✓ Submit Tuition Expense Form (attached-last page). ✓ If parent is attending school, a statement from college of hours taken and degree status is requested. Parent must be attending half-time and be degree seeking. |
| <input type="checkbox"/> | <p>Other</p> <p>Please specify and provide the appropriate documentation.</p> | |



SECTION B: ANTICIPATED TOTAL INCOME FOR CALENDAR YEAR 2008 (JAN 2008 – DEC 2008)

Do not leave any sections blank: write "0" if income type does not apply. If you are remarried, you must report your income and the income of your current spouse, not the income of the natural father and/or mother. Eligibility for financial aid is determined by the parent with whom the student lived with last and/or provides more than 50% of the care and support for the student. This normally means the parent with whom the student lived with last since there are hidden costs associated with this type of arrangement.

Table with 4 columns: Income Type, Father/Stepfather Student's Spouse, Mother/Stepmother, Student. Rows include: Anticipated Total Gross Income from Work (Before Taxes), Unemployment Benefits and/or severance pay, Alimony, Interest and Dividends, Net amount to be received from withdrawal from pensions or annuities (excludes rollovers), Earned income credit, Additional child tax credit, Social Security Benefits received that will not be taxed, Welfare Benefits, including Temporary Assistance for Needy Families (TANF), Payments to tax-deferred pension and savings plans and untaxed portions of pensions and IRA distributions (exclude rollovers), Child support received for all children (do not include foster care or adoption payments), Cash received, or money paid on your behalf, not already reported above, Any other anticipated untaxed income or benefits not already reported above such as worker's compensation, disability, etc., Anticipated 2008 Education credits (Hope and Lifetime Learning tax credits), Child support to be paid in 2008 because of divorce, separation or as a result of a legal requirement, Anticipated 2008 taxable need-based work-study earnings and anticipated taxable employment portions, Anticipated grant and scholarship aid to be reported to the IRS in your adjusted gross income, Total 2008 Anticipated Income.

Certification Statement

I certify that the submitted information is true and accurate to the best of my knowledge and belief. I have read each section and have provided the required documentation. I understand that underestimating projected income could result in reduced eligibility and/or repayment of aid and/or denial of future reviews/appeals, in this and/or future years.

Father / Stepfather Signature: _____ Date: _____
Mother / Stepmother Signature: _____ Date: _____
Student Signature: _____ Date: _____
Student Spouse Signature: _____ Date: _____



THIS SECTION MUST BE COMPLETED
2008-2009
Dependent and Independent Verification Worksheet

Your FAFSA application was selected for review in a process called "Verification." In this process, Saint Louis University will be comparing information from your application with signed copies of your and/or your parent(s)' 2007 Federal tax forms, or with W-2 forms or other financial documents. The law states we have the right to ask you for this information before awarding Federal Aid. If there are differences between your submitted FAFSA and your financial documents, Saint Louis University will make the appropriate corrections.

Complete this verification form and submit it to the Office of Student Financial Services as soon as possible so that your financial aid won't be delayed.

***Medical Students** who provided parental data on the FAFSA, must complete the **Dependent and Independent** sections in order to be considered for Institutional aid.

WHAT YOU SHOULD DO:

1. Collect your and/or your parent(s)/spouse's financial documents (**signed** federal income tax forms, W-2 forms, etc.)
2. Speak with your Student Financial Services Counselor if you have questions about completing this worksheet.
3. Complete and sign the worksheet—you and/or your spouse and at least one parent if required.
4. Submit the completed worksheet, tax forms and any other documents requested.
5. The Office of Student Financial Services will compare information on this worksheet and any supporting documents with the information you submitted on your FAFSA.

Saint Louis University must review the requested information under the financial aid program rules (34 CFR, Part 668)

Section One:

- ✓ Were you born before January 1, 1985? YES _____ NO _____
- ✓ At the beginning of the 2008-2009 school year, will you be working on a master's or doctorate program? YES _____ NO _____
- ✓ Were you married at the time you completed your 2008-2009 FAFSA? YES _____ NO _____
- ✓ Do you have children who receive more than half of their support from you? YES _____ NO _____
- ✓ Do you have dependents other than your children/spouse who live with you and who receive more than half of their support from you, now and through June 30, 2009? YES _____ NO _____
- ✓ Are (a) both of your parents deceased, or (b) are you (or were you until age 18) a ward/dependent of the court? YES _____ NO _____
- ✓ Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training? YES _____ NO _____
- ✓ Are you a veteran of the U.S. Armed Forces?
 ~Answer "Yes," you are a veteran, if you (1) have engaged in active duty in the U.S. Armed Forces (Army, Navy, Air Force, Marines, or Coast Guard) or are a National Guard or Reserves enlistee who was called to active duty for purposes other than training, or were a cadet or midshipman at one of the service academies, and (2) were released under a condition other than dishonorable. Also answer "Yes" if you are not a veteran now but will be by June 30, 2009. YES _____ NO _____
 ~Answer "No," you are not a veteran, if you (1) have never engaged in active duty in the U.S. Armed Forces, (2) are currently an ROTC student or cadet or midshipman at a service academy, or (3) are a National Guard or Reserves enlistee activated only for training. Also, answer "No" if you are currently serving in the U.S. Armed Forces and will continue to serve through June 30, 2009.



If you answered "No" to EVERY question on the preceding page, check **DEPENDENT** and follow the directions below.
***** If you answered "Yes" to one or more items, see below for "Independent" instructions.

DEPENDENT: List the following (attach a separate page if necessary):

- ✓ Yourself and your parent(s) (including stepparent) even if you do not live with your parent(s).
- ✓ Your parents' other children, even if they do not live with your parent(s) if:
 - a. Your parent(s) will provide more than half of their support from July 1, 2008 through June 30, 2009
 - b. OR the children would be required to provide parental information when apply for Federal Student Aid, and
 - c. Other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.

| Full name | Age | Relationship to you | Name and state of college if attending during 2008-2009 | Enrolled half time or more in a degree program? |
|-----------|-----|---------------------|---|---|
| | | self | Saint Louis University | Yes / No |
| | | | | Yes / No |
| | | | | Yes / No |
| | | | | Yes / No |
| | | | | Yes / No |

Documentation Requested:

- ✓ Attach a **signed** copy of your **and** your parent(s) **2007** federal income tax return and all schedules. Include W-2 forms if applicable.
- ✓ If you and/or your parent(s) **did not file** AND were not required to file a **2007** federal income tax return, please check the appropriate box.
 - Student Non-Tax Filer**
 - Parent Non-Tax Filer**

If you answered "YES" to ANY question on page 4, check **INDEPENDENT** and follow the directions listed.

INDEPENDENT: List the following (attach a separate page if necessary):

- ✓ Yourself and your spouse (if you are married).
- ✓ Your children, if you will provide more than half of their support from July 1, 2008 through June 30, 2009.
- ✓ Other people if they now live with you, and you provide and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.

| Full name | Age | Relationship to you | Name and state of college if attending during 2008-2009 | Enrolled half time or more in a degree program |
|-----------|-----|---------------------|---|--|
| | | self | Saint Louis University | Yes / No |
| | | | | Yes / No |
| | | | | Yes / No |
| | | | | Yes / No |
| | | | | Yes / No |

Documentation Requested:

- ✓ Attach a **signed** copy of your **and** your spouse's (if you are married) **2007** federal income tax return and all schedules. Include W-2 forms if applicable.
- ✓ If you and/or your spouse **did not file** AND were not required to file a **2007** federal income tax return, please check the appropriate box.
 - Student Non-Tax Filer**
 - Spouse Non-Tax Filer**



Section Two:

Table with 3 columns: Student/Spouse, Worksheet A (Report amounts for the 2007 calendar year), and Parents. It lists various tax credits and income items such as Earned income credit, child tax credit, welfare benefits, and IRA deductions.

My signature below certifies that the information reported is complete and correct.

Student signature: _____ Date: _____

Parent / Spouse signature: _____ Date: _____
(Dependent) (Independent)

Please provide contact information:

Name: _____ Cell phone: _____ Email address: _____

For private school tuition expenses paid between

January 1-December 31, 2007,

please submit this form to the private elementary/secondary school.

This form must be printed on school letterhead.

| | |
|--|--|
| Saint Louis University Student Name: | |
| Saint Louis University Banner ID Number: | |
| Student attending private elementary/secondary school | |
| Relationship to SLU Student | |
| The expenses for the above named student have been PAID between January 1 – December 31, 2007. <i>Please note: This is different than an academic year (ie. August 2006-May, 2007).</i> | |
| Tuition: | |
| The expenses listed below ARE NOT considered to adjust SLU aid; however, they may be listed. | |
| Fees: | |
| Books: | |
| Miscellaneous Expenses: Indicate expense | |
| Other: | |

School Official Signature: _____ Date: _____

School Official Name: _____

School Official Title: _____

School Official Telephone: _____

SLU Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____