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Student Last Name

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Student First Name

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Student ID

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Date of Birth (mmdyyy)

If you have extenuating circumstances that affect your ability to contribute to your educational costs, you may request a review of your financial resources.

Appeals will not be considered without the completed appeal form, your written statement explaining your Special Circumstance, and ALL supporting documentation. If any part of this process is incomplete or documentation is insufficient, the appeal will be denied.

NOTE: If the Special Circumstance Appeal you are submitting is related to the COVID-19 Pandemic, please explain how you were affected in your Special Circumstance Statement and include any supporting documentation (i.e. Loss of Employment/Earning Decrease, Unreimbursed Medical Expenses, Child Care)

Verification of the 2023-24 FAFSA must be completed before any Special Circumstance review will be considered. Additional documentation may be requested by the University.

STUDENT INSTRUCTIONS:

- Complete, sign and date this form in black or blue ink.
- Include printed name and student ID or last four digits of the student’s social security number on all documents.
- Check the applicable box below:
 - I am an Independent Student: Supporting documentation requested below is for you (and your spouse, if married).
 - I am a Dependent Student: Supporting documentation to be provided below is for your parent (and self, if applicable)

Check the box(es) below to indicate the reason(s) for your appeal and attach the listed documentation:

- Marital Status Change**
 - A signed and dated statement explaining your circumstances.
 - Copy of the Divorce Decree or Separation Agreement, Marriage License, or legal document from attorney or court.
 - Copy of 2021 and 2022 W-2(s), include spouse where applicable.
 - Copy of 2021 IRS Tax Transcript(s), if not provided with Verification. Transcripts can be requested at www.irs.gov/transcript.
 - Signed copy of 2022 Federal Tax Return (We will not need Tax software worksheets, State Tax Returns or Local Tax Returns)

Loss of Earned Income.

- A signed and dated statement explaining unemployment status, including employer name, dates unemployed, current job search status, and household income resources.
- Copy of a Termination/Separation letter from your former employer stating your dates of employment (OR) a copy of your Unemployment Determination of Benefits document showing eligibility date, weekly benefit amount, and date eligibility ends.
- Copy of final pay stub with year-to-date earnings and showing all paid-out benefits (i.e. vacation, sick time).
- Copy of 2021 and 2022 W-2(s), include spouse where applicable.
- Copy of 2021 IRS Tax Transcript(s), if not provided with Verification. Transcripts can be requested at www.irs.gov/transcript.
- Signed copy of 2022 Federal Tax Return (We will not need Tax software worksheets, State Tax Returns or Local Tax Returns)
- Copy of Severance pay document (if applicable).

Decrease of Earned Income If you changed employers and your income is less or you are working for the same employer and your rate of pay has decreased, please provide the document listed below:

- Signed and dated statement-explaining employment changes, including employer name, date employer and/or income changed.
- Signed and dated letter from your previous employer (**on company letterhead**) stating your dates of employment or date change in income occurred with current and previous rate of pay.
- Copy of final pay stub with year-to-date earnings including all paid out benefits (i.e. vacation, sick time).
- Signed and dated letter from new employer (**on company letterhead**) stating the date you began employment.
- Copy of most recent pay stub to reflect your new rate of pay and a copy of final paystub reflecting prior pay with year-to-date earnings if applicable.
- Copy of 2021 and 2022 W-2(s), include spouse where applicable.
- Copy of 2021 IRS Tax Transcript(s), if not provided with Verification. Transcripts can be requested at www.irs.gov/transcript.
- Signed copy of 2022 Federal Tax Return (We will not need Tax software worksheets, State Tax Returns or Local Tax Returns)

Adjusted Gross Income Update due to American Rescue Plan Act

- Signed copy of 2021 Federal Tax Return with original tax filing date prior to March 11, 2022
- Copy of unemployment benefits received during tax year 2021

Loss/Reduction of Child Support Benefit

- Statement from Child Support Enforcement Agency showing payments for the 2021, 2022, and 2023 years with the obligor/obligee names (OR) a copy of end of year pay stub showing total amount withheld from pay for child support.
- Copy of Divorce Decree with Child Support Agreement if child/children names are not included on the statement from the Child Support Enforcement Agency or if multiple dependent children are included in the household.
- Signed and dated statement explaining the circumstance, including the name(s) of the child/children who they will cease receiving benefits for and if they will continue to receive benefits for other dependent children. You must also include the date child support benefits end.

One-Time-Only Distribution

- Copy of 2021 tax document(s) reflecting distribution (i.e. W-2G, 1099-R, 1099-B, and 1099-C).
- Copy of 2021 IRS Tax Return Transcript(s), if not provided with Verification. Transcripts can be requested at www.irs.gov/transcript.
- Signed and dated statement explaining:

- How the funds were used and the amount of any unused funds, if applicable

Unusual Medical Expenses (not applicable for graduate students) - Only expenses **incurred** and **paid** in 2021 will be considered.

- A signed and dated statement explaining your circumstances.
- Itemized account statements showing patient name, date of service, charges, and student payment, OR;
- Copy of Tax Schedule A from your 2021 IRS 1040 Federal Tax Return (if medical expenses were reported).

Loss or Reduction of Income Due to Disability or Retirement


- Copy of disability or retirement benefit statement(s) showing date disability or retirement began and the monthly benefit amount.
- Copy of final pay stub(s) with year-to-date earnings (if employed all/partial year).
- Copy of 2021 & 2022 W-2(s) - include spouse where applicable.
- Copy of 2021 IRS Tax Transcript(s), if not provided with Verification. Transcripts can be requested at www.irs.gov/transcript.
- Signed copy of 2022 Federal Tax Return (We will not need Tax software worksheets, State Tax Returns or Local Tax Returns)
- A signed and dated statement explaining your special circumstance.


Other Circumstances

APPEAL PROCESS:

1. If your appeal is approved, you will be notified by mail or email and your Student Aid Report will be reprocessed by the U.S. Department of Education with the special circumstances information. This process could take up to four weeks.
2. If your appeal is not approved, you will be notified by mail or email and your aid will be based on the information provided on the FAFSA.

Certification and Signatures: I certify that all information and documentation submitted is true and correct to the best of my knowledge. If asked, I agree to provide additional proof of the information/documentation provided with this form. I authorize the University to verify any third-party documentation which I have submitted.

 **Student Signature:** _____ **Date:** _____

 **Parent Signature:** _____ **Date:** _____

Return this form, your letter, and supporting documentation within 2 weeks to: finaidforms@franklin.edu