



2018-2019 Special Circumstances Form – Estimated 2018 Income

Student Name _____ SU ID _____

If your family has experienced a **major** reduction in income of at least 20% below their 2016 income in either late in 2017 or in 2018, the Financial Aid Office will consider income for the 2018 tax year to re-evaluate your financial aid eligibility. Families and students should realize that financial aid funds are limited and aid programs have statutory limits on the amount a student can receive each year. Additional funds, if available, may take the form of a new or increased loan.

- If you had to provide parent data on your FAFSA, then you are a “DEPENDENT” student
- If you weren’t required to provide any parent data on your FAFSA, then you are an “INDEPENDENT” student.

The individual(s) experiencing the reduction must provide the following:

- A brief written statement explaining **1)** the special circumstance as well as 2) how you arrived at your 2018 expected income (Estimated Income Information section)
- Copy of a termination letter OR proof of separation/income reduction from agency/employer
- Copy of your unemployment benefits (or explanation of why they are not included)
- This completed form (with required signatures)

AND

DEPENDENT STUDENTS

(as defined by the FAFSA/U.S. Department of Education)

- Copy of the most up-to-date pay stub(s) for all parents/step-parents on the FAFSA showing year-to-date earnings for 2018.
- 2017 W-2 form(s) for the parent(s)/step-parent(s) listed on the 2018-2019 FAFSA.*
- 2017 IRS tax return transcript for the parent(s)/step-parent(s) listed on the 2018-2019 FAFSA.*

OR

INDEPENDENT STUDENTS

(as defined by the FAFSA/U.S. Department of Education)

- Copy of the most up-to-date pay stub(s) for student and spouse (if applicable) showing year-to-date earnings for 2018.
- 2017 W-2 form(s) for the student (and spouse, if married). *
- 2017 IRS tax return transcript for the student (and spouse, if married). *

**If the affected individual(s) did not file 2017 taxes, and/or did not have 2017 W-2 form(s), that individual must submit a signed statement (prior to June 1, 2018) or an IRS non-filer letter (after June 1, 2018) to verify that fact. After July 1, 2018 all non-filers will need to complete IRS Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) and submit to IRS to request a “letter of non-filing”. The IRS 4506-T form can also be used to request an IRS Tax Return Transcript as well as a transcript of W-2 form(s) if needed.*

**Make sure all items listed in the boxes above have been completed.
THIS APPEAL WILL NOT BE REVIEWED IF REQUESTED ITEMS ARE MISSING.**

Family Household Information

List the people in your household for the 2018-2019 academic year – BE SURE TO INCLUDE:

➤ **YOURSELF (THE STUDENT)**

➤ **DEPENDENT** -your parent(s)/stepparent. *If your parent is remarried, include information about your parent **and** your parent's current spouse.*
INDEPENDENT – your spouse (if you are married)

➤ **DEPENDENT**- your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2018 through June 30, 2019 or (b) if the children would be required to provide parental information if they were completing a 2018-2019 FAFSA
INDEPENDENT - your children, if you will provide more than half of their support from July 1, 2018 through June 30, 2019

➤ *Include other people if:*

DEPENDENT - they currently 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, 2018 through June 30, 2019. Documentation may be required.

INDEPENDENT - they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2018 through June 30, 2019. Documentation may be required.

Full Name of Household Member (see above)	Age	Relationship to Student	Enrolled in College 2018-2019?	Name of College <small>(attending at least half-time, in a school eligible to participate in Title IV programs and enrolled in a degree seeking or certificate program in 2018-2019, excluding parents)</small>
		SELF	Yes	Salisbury University

*attach sheet for additional household members that meet the above criteria

Verification of Untaxed Income

Complete all items in the chart. Write "0" for items that do not apply. **DO NOT leave items blank.**

Untaxed Income for 2018	FAFSA Question 45 STUDENT	FAFSA Question 94 PARENT/SPOUSE
Child support received for ALL children during 2018. Do not include foster care or adoption payments.	\$	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance of housing.	\$	\$
Veteran's non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowance.	\$	\$
Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.	\$	\$

Estimated Income Information

- Complete both of the sections below with income before exemptions, adjustments, or deductions that you or your family expect to receive for the 2018 tax year.
- Complete all items.
- If there will be no income in any specific category, write **“NONE”** or **“0”** in the income box for that category.

ESTIMATED 2018 GROSS INCOME	Independent Students Only:	Student	Spouse
	Dependent Students Only:	Father	Mother
1. Wages, salaries, tips (include severance pay)		\$	\$
2. Pensions and annuities		\$	\$
3. Interest and dividends and capital gains		\$	\$
4. Business or farm income		\$	\$
5. Social Security benefits (taxable)		\$	\$
6. Income received from rents after expenses paid for mortgage interest, taxes, and insurance		\$	\$
7. Alimony		\$	\$
8. Unemployment compensation		\$	\$
9. Any other taxed income		\$	\$
Total Estimated Income (1-9)		\$	\$

ESTIMATED 2018 UNTAXED INCOME	Independent Students Only:	Student	Spouse
	Dependent Students Only:	Father	Mother
1. Payment to tax deferred pension and savings plans (paid directly or withheld from earnings). Including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D,E,F,G,H and S		\$	\$
2. Deductible IRA and/or Keogh, SEP, and SIMPLE payments		\$	\$
3. Child Support received for all children		\$	\$
4. Tax exempt interest income		\$	\$
5. Untaxed portions of IRA distributions		\$	\$
6. Untaxed portions of pensions		\$	\$
7. Living and housing allowances (excluding rent subsidies for low income housing) for clergy, military and others (include cash payments or cash value of benefits)		\$	\$
8. Veteran’s Non-educational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and /or VA Educational Work-Study allowances		\$	\$
9. Any other untaxed income and benefits such as Workers Compensation, disability, etc.		\$	\$
10. Cash support or money paid on behalf of the student or the family		\$	\$
11. Cash or any money paid on your behalf, not reported elsewhere on this form			
List Type:		\$	\$
List Type:		\$	\$
List Type:		\$	\$
Total Estimated Untaxed Income (1-11)		\$	\$

- I certify that the information on this form is true and correct to the best of my knowledge and belief.
- I understand that if I underestimate the income, I may lose eligibility for future aid and have to repay financial aid already received.

Student Signature _____

Date _____

Parent/Spouse Signature _____

Date _____