



2023-2024 REVIEW OF SPECIAL CIRCUMSTANCES

Student's Name _____ **ID Number (7 digits)** _____

The 2023-2024 Free Application for Federal Student Aid (FAFSA) you completed used 2021 income and assets to determine your financial need for this academic year. Federal regulations allow financial aid administrators to make professional judgements in regard to students who have special circumstances that could affect their ability to pay for their education. If you and/or your family have experienced major changes in your income since filing the FAFSA, you should use this form to have your financial aid file reviewed.

Forms must be submitted at least *two weeks* before the end of the semester to allow time for the form to be processed and financial aid eligibility to be re-evaluated.

EXAMPLES OF SPECIAL CIRCUMSTANCES AND REQUIRED DOCUMENTATION:

- Divorce/Separation or death of a family member (spouse or parent, for dependent students) after filing original FAFSA
Required Documentation: Separation statement indicating date of separation, divorce papers, death certificate or obituary
- Elementary or secondary school tuition in the calendar year 2021
Required Documentation: A school statement showing the date and amount paid in 2021 for tuition only
- Excessive 2021 medical/dental/nursing home expenses paid by the student (or parent, for dependent students) and not covered by insurance (unpaid medical/dental/nursing home charges do not qualify)
Required Documentation: Copies of receipts from 2021 for all medical/dental/nursing home payments
 OR
Required Documentation: Letter stating 2021 charges from health care provider or nursing home not covered by insurance
- Loss of income for an extended period due to loss of job resulting in unemployment for at least 10 consecutive weeks in 2023
Required Documentation: Copy of termination notice or letter from former employer stating last day of employment
- Non-taxable income (social security benefits, child support received, etc.) has been substantially reduced or eliminated for the 2023 year
Required Documentation: A statement from the appropriate agency, stating the last date the benefit was paid. In cases of loss of child support, attach a copy of divorce decree indicating the date the child support ceased
- Reduction of income for an extended period of time due to returning to school or health problems
Required Documentation: Letter from employer showing, with dates, inability to work/reduction in hours
- Student/spouse or parent, for dependent students, income for 2021 that includes an income that is typically only received once
Required Documentation: An official document identifying the source of income (ex. Capital gains from sale of assets, prize winnings, pension payoffs, etc.) AND
Required Documentation: Personal statement explaining how the funds were spent



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PERSONAL STATEMENT

Briefly explain the changes in your financial situation. Use a separate sheet, if necessary.

Lined area for writing the personal statement.

CERTIFICATION AND SIGNATURE(S)

I request that my financial aid eligibility be re-evaluated due to a change in my or my family's circumstances which will significantly reduce my income and resources for this academic year. I certify that the information provided in my personal statement, attached documentation and on this form is true and complete to the best of my knowledge. I understand that additional information may be requested once the form and documentation is reviewed. TWU Financial Aid Staff are mandatory reporters, meaning they are required by law to report cases of sexual harassment/misconduct to TWU's Title IX Coordinator.

Student Signature

Date

Parent Signature, if applicable

Date

Note: This form must be signed with a physical signature. Typed names and electronic signatures are not acceptable.



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2023 ESTIMATED ANNUAL INCOME

Provide annual estimates of income for the period January 1, 2023 to December 31, 2023. Do not leave any lines blank. If an amount is zero or not applicable, indicate with a "\$0" or "N/A".

	Student	Spouse or Parent 1	Parent 2
Wages from work	\$	\$	\$
Interest or Dividend Income	\$	\$	\$
Unemployment	\$	\$	\$
IRA distributions, pensions	\$	\$	\$
Alimony received	\$	\$	\$
Business &/or farm income/loss	\$	\$	\$
Rental real estate, royalties, S Corp, partnerships and trusts	\$	\$	\$
Capital gains or losses	\$	\$	\$
Social Security Received (Taxed)	\$	\$	\$
Payments to tax-deferred pension/savings	\$	\$	\$
Deductible IRA & Keogh payments	\$	\$	\$
Tax exempt interest income	\$	\$	\$
Untaxed portions of IRA distributions or pensions	\$	\$	\$
Housing, food and other living allowances for 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 for housing.	\$	\$	\$
Veteran's Non-Educational 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 (i.e. bills)	\$	\$	\$
Other Untaxed income not reported, such as worker's compensation, disability, etc. DO NOT include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, combat pay, benefits from flexible spending arrangements, foreign income exclusion, or credit for federal tax on special fuels.	\$	\$	\$
Child Support Paid	\$	\$	\$
Earnings from Federal Work-Study or need-based employment (fellowships/assistantships)	\$	\$	\$
Combat Pay or special combat pay. Only enter the amount that was taxable and included in your Adjusted Gross Income (AGI).	\$	\$	\$