

09-10



Office of Student Financial Aid
150 Tirey Hall, Terre Haute, IN 47809
Phone: (812) 237-2215 or (800) 841-4744
Fax: (812) 237-4330 or (812) 237-3925
Email: finaid@indstate.edu
Web: www.indstate.edu/finaid

SPECIAL CIRCUMSTANCE APPEAL FORM

Student First Name M.I. Last Name 991-_____
ID Number

Submit this completed form and attach all supporting documents listed on page 2 for your request if you or an immediate family member have had a significant loss of income or benefits or have incurred unusual expenses which are substantially affecting your ability to pay for school.

Select the special circumstance that applies specifically to your family.

____ **A. Loss of Income Due To Unemployment, Underemployment, or a Loss of Benefit**

You, your parent(s) or spouse were employed in 2008, but are now unemployed, underemployed or have lost funding from a benefit (like Social Security payments) or untaxed income.

1. Name of person who incurred loss _____
2. Their relationship to the student _____
3. Date of income loss _____
4. Person's projected 2009 earnings \$ _____
5. Person's projected 2009 untaxed income \$ _____
(Include Social Security, unemployment comp., pension, annuity, lump sum distribution, disability benefits, etc.)

____ **B. Unusually High Unreimbursed Medical, Optical, and/or Dental Expenses Paid**

You, your spouse or your parent(s) have incurred unreimbursed medical, optical, and/or dental expenses (including insurance premiums) in 2008 or 2009 that are **in excess of 11%** of the total Adjusted Gross Income reported on the 2008 federal taxes used to complete the FAFSA.

____ **C. Death of Parent or Spouse since filing the FAFSA**

1. Name of deceased _____
2. Their relationship to you _____
3. Date of Passing _____

____ **D. Other Unusual Circumstances**

You, your parent(s), or your spouse have experienced costly UNUSUAL expenses in 2009 that are significantly affecting your ability to pay for your educational expenses.

CERTIFICATION AND SIGNATURES

I certify that the information and documentation provided is complete and accurate to the best of my knowledge. I have provided complete documentation to allow for a full review of my situation. I understand that my special circumstances request will be considered based upon the information provided and submission of insufficient documentation will be justification for denial without further review.

_____ Student Signature <i>(required)</i>	_____ Date	_____ Parent Signature <i>(required for dependent students)</i>	_____ Date
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Also turn in the required supporting documents listed on page 2.

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The following items are **required** along with your request if you have not already turned them in:

- A detailed cover letter explaining the cause of the loss or expense occurred.
- A Verification Form (Dependent or Independent as appropriate for your dependency determined by the answers from your FAFSA).
- Signed copies of the 2008 federal income tax forms that were required to complete your FAFSA.

Also turn in the supporting documentation listed below applicable to your situation:

_____ **A. Loss of Income Due To Unemployment, Underemployment, or a Loss of Benefit**
Supporting documentation should include the items appropriate to your situation below:

- 2008 federal income tax schedules and attachments related to the loss of income
- copy of termination, resignation or retirement notice
- employer verification of reduction in earnings due to a change in employment or natural disaster
- a copy of the notification of date when Social Security Benefits would end
- verification of untaxed income and/or benefits in 2009
- court records or other official correspondence verifying the reduction or loss of income or benefits
- a copy of the declaration of disability notice

_____ **B. Unusually High Unreimbursed Medical, Optical, and/or Dental Expenses Paid**
Supporting documentation should include:

- 2008 federal income tax return Schedule A showing claimed expenses paid
- **Or** copies of the receipts showing the amounts you, your spouse and/or parent(s) paid in 2009
- *Note that amounts billed, but unpaid, cannot be considered for adjustment.*

_____ **C. Death of Parent or Spouse since filing the FAFSA**
Supporting documentation should include:

- 2008 federal income tax W-2's, schedules and attachments related to that person's income
- Copy of their death certificate

_____ **D. Other Unusual Circumstances**
Supporting documentation should include:

- Detailed documentation confirming the costs and their relevance to your educational pursuit.