

## Special Circumstance Form 2010-2011



2065 Half Day Road · Deerfield, Illinois 60015 · USA

### Independent

Federal Student Aid Regulations provide the potential for reevaluation if your financial circumstances change. The 2009 income information that you reported on your financial aid application may not be an accurate indicator of your ability to pay for educational costs. You (or your spouse) must meet one of those circumstances indicated below to qualify for reevaluation of your financial aid eligibility.

Once you have completed all steps below, return this form along with the **required supporting documentation** to the Trinity International University Financial Aid Office. Submission of this form does not guarantee a change in your financial aid eligibility. Each case will be evaluated on an individual basis.

#### Step I: Student Information

Name \_\_\_\_\_ Date \_\_\_\_\_  
Last First MI  
Permanent Address \_\_\_\_\_  
Number and Street (including Apt. No.) City State Zip Code  
Social Security Number \_\_\_\_\_ Phone \_\_\_\_\_

#### Step II: Reason for Filing a Special Circumstance Form

Check (✓) the circumstance that applies to your situation. Required documentation to support you or your spouse's circumstance **must be attached**.

A. You (or your spouse) earned money in 2009 but have lost your full-time job in the last ten (10) weeks and are still unemployed.

##### Required Documentation:

- Statement from ALL previous employer(s) you (or your spouse) worked for in 2009 and/or 2010 on company letterhead indicating:
  - Date you (or your spouse) ceased employment
  - Total earnings for the ENTIRE year of 2009
  - Wages for 2010 (if employment ceased in 2010); and
- A current statement of unemployment benefits received.
- Copy of your (and your spouse's) 2009 W-2 form(s).
- Copy of your (and your spouse's) 2009 federal 1040 tax return

B. You (or your spouse) earned money in 2009 but have changed employment and are currently earning substantially less money in 2010.

##### Required Documentation:

- Statement on company letterhead from ALL employers you (or your spouse) worked for in 2009 and/or 2010 indicating:
  - Dates of employment
  - Your (or your spouse's) estimated earnings for 2010;
- Your (or your spouse's) 2009 W-2 form(s)
- Copy of your (and your spouse's) 2009 federal 1040 tax return

C. You (or your spouse) received unemployment compensation or some other taxed or untaxed income or benefit for at least ten (10) weeks in 2009 but have completely lost that income or benefit.

##### Required Documentation:

- Statement of termination from the source of income. *Include* dates he/she received the benefits.  
NOTE: Income and benefits include such things as: Social Security benefits, court-ordered child support, retirement or disability benefits. Don't include loss of veteran's educational benefits.

- A statement from the source of the income or benefit indicating the dates he/she received the income benefit and the estimated income or benefit received in 2009.
- Copy of your (and your spouse's) 2009 federal 1040 tax return

D. After you applied for financial aid for 2010-2011, you and your spouse have separated or divorced.

##### Required Documentation:

- Copy of your (and your spouse's) 2009 federal 1040 tax return;
- Copy of your 2009 W-2 form(s); and
  - If you are separated:** Attach a notarized statement indicating the date of separation; or
  - If you are divorced:** Attach a copy of the divorce decree.

E. Since you applied for financial aid for 2010-2011, a supporting spouse has died.

##### Required Documentation:

- Copy of your spouse's death certificate;
- Copy of your 2009 federal 1040 tax return; and
- Copy of your 2009 W-2 form(s).

F. You (or your spouse) received a one-time income supplement in 2009, such as Social Security payment, inheritance, IRA, or pension distribution.

##### Required Documentation:

- Copy of your (and your spouse's) 2009 federal 1040 tax return;
- Statement from source of one-time income indicating amount; and
- Statement from you indicating the disposition of the funds.

(Continued on back)

G. You paid out (not owed) a large amount of medical and/or dental expenses in 2009.

Total unreimbursed Medical and Dental Expenses Paid in 2009

\$ \_\_\_\_\_

**Required Documentation:**

- 1. Copy of your (and your spouse's) 2009 federal 1040 tax return
- 2. Copy of your 2009 federal income tax Schedule A; and
- 3. Copies of the medical and dental payments not covered by insurance that you have already paid.

H. You paid private or parochial elementary and/or secondary tuition in 2009.

Total Tuition Paid in 2009: \$ \_\_\_\_\_

**Required Documentation:**

- 1. Copies of paid receipts for private or parochial elementary and/or secondary tuition; or
- 2. A statement from the education institution indicating tuition paid in 2009.
- 3. Copy of your (and your spouse's) 2009 federal 1040 tax return

**Step III: Your Family's Expected Income in 2010**

(Note: If you checked items D, E, F, G, or H, skip Step III and complete Step IV.)

- 1. In 2010, how much will you earn from work? \$ \_\_\_\_\_
- 2. In 2010, how much will your spouse earn from work? \$ \_\_\_\_\_
- 3. In 2010, what will be the amount of your tax deductible IRA and/or Keough? \$ \_\_\_\_\_
- 4. In 2010, how much will you receive in Unemployment Compensation? \$ \_\_\_\_\_
- 5. In 2010, how much will your spouse receive in Unemployment Compensation? \$ \_\_\_\_\_
- 6. In 2010, how much will you and your spouse receive in Child Support? \$ \_\_\_\_\_
- 7. In 2010, how much will you receive in Workers' Compensation? \$ \_\_\_\_\_
- 8. In 2010, how much will your spouse receive in Workers' Compensation? \$ \_\_\_\_\_
- 9. In 2010, how much will you receive in Social Security benefits? \$ \_\_\_\_\_
- 10. In 2010, how much will your spouse receive in Social Security benefits? \$ \_\_\_\_\_
- 11. In 2010, how much will you and your spouse earn in AFCD or ADC? \$ \_\_\_\_\_
- 12. In 2010 how much will you and your spouse receive in other untaxed income, such as earned income credit, housing, food, and other living expenses from military, clergy, and others? (Include cash payments and cash value benefits.) \$ \_\_\_\_\_

**Step IV: Read, Sign and Return to Trinity Financial Aid Office**

*Certification:* All the information on this form and the attached documents is true and correct to the best of my knowledge. If asked by an authorized official, I agree to provide additional proof of the information that I have given on this form. I realize that this proof may include a copy of federal or state tax returns. I also realize that if I do not give proof when asked, the Special Circumstance will not be reviewed.

Student Signature \_\_\_\_\_ Spouse Signature \_\_\_\_\_

Date Completed \_\_\_\_\_ **Is your required documentation attached?**

**OFFICE USE ONLY**

APPROVED  DENIED Date \_\_\_\_\_ Staff Signature \_\_\_\_\_  2<sup>nd</sup> Check By: \_\_\_\_\_

Reason for Denial \_\_\_\_\_