2020-2021 Change of Financial Situation - Independent Student

For Priority Processing Submit Form By July 15, 2020

If your or your spouse’s financial situation has changed from what was reported on the 2020-2021 Free Application for Federal Student Aid (FAFSA), use this form to request an evaluation of your financial aid eligibility. This form is meant to be a one-time form, not one that is completed every year, except in special circumstances. **This form should only be completed by independent undergraduate students who meet one of the reasons listed below in Section B.** As a general rule, the anticipated 2020 Adjusted Gross Income (AGI) should be at least 20% less than the actual 2018 AGI before submitting documentation for reasons A, B, and C. **Submission of this form does not guarantee an adjustment to your financial aid.**

Please note, we reserve the right to correct information on the FAFSA, and to select students for verification if we have documents on file for other tax years. Please submit the specific tax year information listed on this form. **If you submitted the same tax information to our office in the prior academic year, you do not need to submit the documents again.**

If this form is not completed and the proper documentation is not submitted, your file will not be reviewed. Keep in mind that as a result of reviewing the additional documentation submitted there may be an increase or decrease in your financial aid eligibility. If your financial aid eligibility changes, you will be notified accordingly.

**You must complete all of the following steps before this form will be reviewed:**

**STEP 1:** Complete all pages of the Change of Financial Situation Form per the instructions with appropriate documentation.

**STEP 2:** Provide a detailed statement, that thoroughly describes the Change in Financial Situation.

**STEP 3:** Submit 8 1/2 x 11 legible copies of all 2018/2019 W-2 forms/benefit statements and signed federal income tax returns for you and your spouse.

**STEP 4:** Submit a 2020-2021 Independent Verification Worksheet.

**STEP 5:** Please submit all documents to the address above or upload in self-service (please do not fax/email).

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**Section A - Demographic Information (Please Print Clearly)**

Student Name: _______________________________ Student Phone: _______________________________

Student Email: _______________________________

Student Address: ________________________________

<table>
<thead>
<tr>
<th>Number and Street</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
</table>

Spouse’s Name (if applicable): _______________________________

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ENTER YOUR 9-DIGIT UIN

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2021 CFS-O N
2020-2021 Change of Financial Situation

Section B - Reasons for the Change of Financial Situation

Complete the items below by submitting ALL applicable documents listed under each reason.

☐ A. Medical/dental expenses not paid by insurance and not claimed as a deduction on your 2018 Income Taxes (January 1, 2018 - December 31, 2018):
   - Student ☐ Spouse ☐
   - As a general rule, these expenses should be at least 20% of your 2018 Adjusted Gross Income before submitting documentation.
   - Attach proof of payment such as canceled checks or receipts for medical/dental expenses PAID in 2018.
   - Attach a separate sheet of paper listing the total amount PAID in 2018.

☐ B. Loss of job/reduction in income in 2019 or 2020:
   - Student ☐ Spouse ☐
   - Attach a statement from your previous employer on company letter head regarding loss of job or change in job status.
   - Attach documentation of unemployment benefits, i.e. the Maximum Benefit Letter detailing the amount received.
   - Attach a copy of your most recent pay statement or last pay statement.

☐ C. Reduction in income in 2019 or 2020 due to a disability:
   - Student ☐ Spouse ☐
   - Reduction in income in 2019 or 2020 due to a disability:

☐ D. Loss of benefits or untaxed income in 2019 or 2020 (i.e., child support, disability benefits, etc.):
   - Student ☐ Spouse ☐
   - Attach a statement from the appropriate agency showing the date the benefit was lost and the monthly amount received before the loss.

☐ E. Divorce or separation of parents AFTER completion of the 2020-2021 FAFSA:
   - Student ☐ Spouse ☐
   **STOP** Do not complete this form.
   - Have your custodial parent complete the 2020-2021 Change of Financial Situation - Parent Form.
   - If there is no custodial parent, see the Dependency Override Request Form.

☐ F. Death of Spouse AFTER completion of the 2020-2021 FAFSA:
   - Student ☐ Spouse ☐
   - Attach a copy of the spouse's death certificate.

ENTER YOUR UIN

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# 2020-2021 Change of Financial Situation

## Section C - Anticipated Income for 2020 (complete for reasons A, B, C, D, and E)

Report all anticipated taxable and nontaxable 2020 income (January 1, 2020 to December 31, 2020).

### EXPECTED TOTAL INCOME AND BENEFITS

<table>
<thead>
<tr>
<th>TAXABLE INCOME FROM WAGES (do not include your unemployment income as wages)</th>
<th>Student</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document gross wages earned through today's date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated anticipated wages from today's date through December 31, 2020:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**OTHER TAXABLE INCOME:**

- Unemployment Income to date and anticipated in 2020: Provide monthly statement
- Severance, Paid Time Off or Vacation Pay Out if not included in gross wages
- Taxable Pension: Provide monthly statement
- Business income, Rents, royalties, and/or annuities
- Maintenance/support from spouse in 2020 (in cases of separation or divorce)
- Taxable income from 401k disbursements or other existing assets: Include year to date gross disbursements and anticipated disbursements
- Other taxable incomes: List the source

### TYPES OF UNTAXED INCOME

- Housing allowance for military or clergy: Contract or LES Statement
- Workers Compensation: Provide monthly statement
- Untaxed Disability Income: Provide monthly statement
- Child Support Received for all members of your household
- Other Untaxed Pension: Provide monthly statement

Check the boxes below to confirm you are submitting all required documentation:

- [ ] Documentation requested on page 2 pertaining to my change of financial situation
- [ ] The 2020-2021 Independent Verification Form and all required verification documents
- [ ] A copy of your signed 2018 IRS Federal Tax Return and IRS Schedules 1, 2, and 3
- [ ] Copies of all of your 2018 W-2 forms
- [ ] A copy of your spouse's signed 2018 IRS Federal Tax Return and IRS Schedules 1, 2, and 3 (only if married)
- [ ] Copies of all of your spouse’s 2018 W-2 forms (only if married)

## Section D - Statement of Certification

I certify that the information provided on this form and any attachments are true and correct. Additionally, it is understood that I must notify Student Financial Aid and Scholarships if the situation outlined in this request changes. If I underestimate my anticipated income, I understand that I may be required to repay previously awarded financial aid. I may also have future Change of Financial Situation requests denied.

Student Signature

Date

[ENTER YOUR UIN]