

# SPECIAL CIRCUMSTANCE FORM

## 2024-2025

STUDENT'S NAME: \_\_\_\_\_ MSJ ID #: \_\_\_\_\_

PERMANENT ADDRESS: \_\_\_\_\_

### **This appeal does not guarantee a change in your Financial Aid Package**

**INSTRUCTIONS:** This form should be completed by families who are experiencing changes in their 2024 financial status or who have unusual expenses as a result of one or more of the following situations. Please check all that apply, provide as much explanation as possible, attach the appropriate documentation, then sign and return all information directly to the Student Administrative Services Office to request a review of your 2024-2025 financial aid application.

### **SPECIAL CIRCUMSTANCES: Please check the item(s) below which describe your current situation.**

1) You or your parent(s)/spouse's 2024 income will be **significantly** lower than your 2022 income due to:

A change in employer. Effective Date: \_\_\_\_\_

**Required Documentation:**

- Complete the estimated income section on page 3.
- Letter from employer indicating last day of employment and amount of benefits to be paid out (e.g., severance pay, vacation pay, etc.)
- Copy of the final pay stub from previous job.
- Letter from new employer indicating start date and pay rate, and a copy of the most recent pay stub from your current job.

Loss of job or retirement from job. Effective Date: \_\_\_\_\_

**Required Documentation:**

- Complete the estimated income section on page 3.
- Letter from employer indicating last day of employment and amount of benefits to be paid out (e.g., severance pay, vacation pay, etc.)
- Copy of the final pay stub from previous job.
- Notice from Bureau of Employment Services, which indicates eligibility for unemployment compensation.

A reduction in or loss of child support, social security benefits, or other benefits received.

**Required Documentation:**

- Complete the estimated income section on page 3.
- Copy of a notice of benefit termination, or a copy of the court order that specifies when payments cease.

Receipt of a lump-sum payment in 2022 which will not be received in 2024.

**Required Documentation:**

- Complete the estimated income section on page 3.
- Copy of 2022 federal tax return.
- Provide documentation of source of lump sum payment.
- Provide documentation of how the lump sum payment was used.

Separation or divorce after filing the 2024-2025 FAFSA. Separation/Divorce Date: \_\_\_\_\_

**Required Documentation:**

- Copy of divorce decree or separation agreement, if available.
- Use the back page to list the name and address of spouse, custodial parent, and any agreements for payment of University expenses.
- Copy of 2022 federal tax return.
- Copy of W-2 forms.

Other: \_\_\_\_\_

2) **You or your parent(s)'/spouse's 2022 income does not accurately reflect your available income because:**

- In 2024-2025, the family will pay tuition of more than \$3500 to private elementary or high school (s). Do not include the amount of tuition paid for college student(s). The amount to be paid is \$\_\_\_\_\_

**Required Documentation:**

- Letter from school(s) stating the name of each child enrolled for the 2024-2025 school year, his/her grade level, and the amount of **tuition to be paid**. **The amount reported should be reduced by any scholarships, grants or need-based aid the student will receive. Please do not include any fees.**
- Complete the information requested below.

Child's Name	Age	Grade	Elementary/Secondary School	Tuition

- In 2023, the family paid more than 11% of their adjusted gross income for medical and/or dental expenses which was not covered or reimbursed by insurance. The amount paid was \$\_\_\_\_\_

**Required Documentation:**

- Copy of 2023 1040 Schedule A (if Schedule A was not filed, submit a statement from your health insurance provider indicating amount of bills not covered by insurance. Attach a statement as to the portion actually paid during 2023.)
- If you wish to explain any unusual medical expenses, please do so below. Continue on page four if more space is needed.


- 3) Use the space on page 4 to explain the circumstances affecting your ability to contribute to your education costs (attach additional pages if necessary).
- 4) If you checked any item under section #1, you must complete the estimated income section(s) on page 3.
- 5) Complete the attached Verification Worksheet with all documentation for review to be considered

***Appeals will NOT be considered until all supporting documents and tax returns are submitted to the Student Administrative Services Office.***

**ESTIMATED 2024 INCOME**

Please complete this section if the family (including parents', stepparents', and/or student's) income will DECREASE in 2024. You should provide your best estimates of the amounts you will receive from all sources (include taxable and non-taxable income) from January 1, 2024 through December 31, 2024.

1. Parent(s) Information		2. Student/Spouse Information	
Father's 2024 anticipated gross earned income	\$ _____	Student's 2024 anticipated gross earned income	\$ _____
Mother's 2024 anticipated gross earned income	\$ _____	Spouse's 2024 anticipated gross earned income	\$ _____
2024 Interest/Dividend Income	\$ _____	2024 Interest/Dividend Income	\$ _____
Alimony Received	\$ _____	Alimony Received	\$ _____
Unemployment Compensation	\$ _____	Unemployment Compensation	\$ _____
Family's 2024 other taxable income	\$ _____	Family's 2024 other taxable income	\$ _____
Child Support	\$ _____	Child Support	\$ _____
Welfare Benefits	\$ _____	Welfare Benefits	\$ _____
Veteran's Benefits	\$ _____	Veteran's Benefits	\$ _____
Worker's Compensation	\$ _____	Worker's Compensation	\$ _____
Disability Benefits	\$ _____	Disability Benefits	\$ _____
Family's 2024 other non-taxable income not listed above. Circle those that apply: interest on tax-free bonds, IRA/KEOGH plans, untaxed pensions, untaxed capital gains, and living allowance for military and clergy.	\$ _____	Family's 2024 other non-taxable income not listed above. Circle those that apply: interest on tax-free bonds, IRA/KEOGH plans, untaxed pensions, untaxed capital gains, and living allowance for military and clergy.	\$ _____
<b>TOTAL</b>	\$ _____	<b>TOTAL</b>	\$ _____

**STATEMENT AND CERTIFICATION**

I (We) hereby affirm that all information reported on this form and any attachments hereto is true, complete, and accurate to the best of our knowledge. I (We) understand that if I (we) receive federal student aid based on incorrect information, I (we) will have to pay it back; I (we) may also have to pay fines and fees. If I (we) purposely give **false or misleading information** on this form, I (we) may be fined \$10,000, sent to prison, or both.

**PLEASE NOTE: If this form is submitted after January 1, 2025 you must include a signed 2024 federal tax return and 2024 W-2 forms.**

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Student Email: \_\_\_\_\_

For Dependent Student's Only:

Father/Stepfather's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Mother/Stepmother's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Email: \_\_\_\_\_

**EXPLANATIONS/ADDITIONAL COMMENTS: (Attach a separate sheet if additional space is needed.)**

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**This appeal does not guarantee a change in your Financial Aid Package**

**COUNSELOR NOTES:**

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**RETURN COMPLETED FORM TO THE MOUNT ST. JOSEPH UNIVERSITY  
STUDENT ADMINISTRATIVE SERVICES  
5701 DELHI ROAD  
CINCINNATI, OH 45233-1670**