



2009-2010 Special Circumstances Appeal

Student's Name: _____ GT ID: _____

The Office of Scholarships and Financial Aid (OSFA) has the authority to make adjustments to an individual's federal student aid application based on special circumstances within the household. Before an appeal can be considered, the 2009-2010 FAFSA must have already been filed and all verification★ documents submitted. We will only consider changes that result from a substantial and involuntary change in circumstance that can be clearly documented. It is important to know that not all changes in circumstances will result in an adjustment to the student's aid eligibility. An adjustment to eligibility may result in increased federal funds (e.g. Federal Direct Subsidized student loan). It will not result in additional institutional funds.

Please submit ALL the following information and documentation:

- A written statement describing your financial circumstances and what caused a decrease in your resources (*use a separate piece of paper*).
- Documentation to support written statement. (*See COMMON SCENARIOS/ EXAMPLES OF BASIS FOR AN APPEAL to determine what supporting documents are needed*)
- Special Circumstance Appeal form completed and signed by all appropriate individuals.

(Note: For appeals submitted after January 1, 2010 submit a copy of the parent and/or student filed 2009 Federal tax return in place of the ESTIMATED 2009 INCOME WORKSHEET.)

★ Verification is the process established by the Department of Education to check the accuracy of aid applications. If you are selected for verification, you will need to complete the specific worksheet for the aid year requested and your dependency status.

- **Dependent** students must submit: Dependent Verification Worksheet, Student's 2008 federal tax return, Parent's prior year federal tax return, and All W2's, 1099's and supporting schedules. www.finaid.gatech.edu/verification
- **Independent** students must submit: Independent Verification Worksheet, Student's 2008 federal tax return, and All W2's, 1099's and supporting schedules. www.finaid.gatech.edu/verification

Include the student's name and GT ID number on all documentation provided. Please follow all instructions completely as missing information will delay the review of your appeal. The student will be notified through their GT email if any changes to their financial aid award occur.

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GT ID: _____

COMMON SCENARIOS/EXAMPLES OF BASIS FOR AN APPEAL

Indicate the individual whose special circumstance you would like to be considered where possible:

- Mother/Step-Mother Father/Step-Father Student Spouse

_____ **A. Loss or Reduction of Income:**

Was employed in 2008, but then experienced a loss of job or reduction of income.

- Date change occurred: _____
- Documentation Required for Loss: 1) Letter from former employer detailing loss of job, last day of employment, and the year to date earnings. 2) Letter from unemployment office detailing how much is received weekly. 3) Most current up to date pay stub.
- Documentation Required for Reduction: 1) Letter from current employer detailing changes in salary. 2) Most current up to date pay stub.

_____ **B. Loss or Reduction of Benefit (e.g. social security and child support):**

Benefit received in 2008 that has expired or no longer exists in the 2009 calendar year.

- Documentation Required for Loss or Reduction of Social Security: Letter from Social Security Office detailing that benefit received has either been reduced or will no longer receive.
- Documentation Required for Loss or Reduction of Child Support: Letter from courts detailing that support for individual has been reduced or will no longer receive.

_____ **C. Change in Parent's Marital Status since filing the FAFSA:**

Parent has become separated, divorced or widowed in 2009.

- Date of Separation Divorce Widowed: _____
- Documentation Required for Separation/Divorce: Copy of legal documentation showing date of legal separation and/or divorce.
- Documentation Required for Widowed: Copy of Death Certificate or Obituary.

_____ **D. Medical Expenses:**

Outstanding major medical/dental expenses paid in the 2008 or 2009 calendar year that were not covered by insurance OR insurance premiums paid.

- Documentation Required: a) Schedule A of Federal tax return **OR** b) Itemized unreimbursed medical expense receipts or statements. (e.g. Itemized statement from billing office showing what was charged, what insurance covered, and what is to be paid by patient)

_____ **E. Other:**

If your situation is not described above, our office will review your statement and determine whether an adjustment is possible. You may be asked to provide documentation specific to your situation.

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ESTIMATED 2009 INCOME WORKSHEET

Estimate your income for the 12 month period of 01/01/2009 – 12/31/2009 for each category below. Do not leave blanks. Report zero (\$0) where applicable. Incomplete information will delay processing.

Estimated Income for 2009	Parent(s)	Student/Spouse
Gross wages, salaries, tips, before taxes:	Father \$ _____	\$ _____ Student
	Mother \$ _____	\$ _____ Spouse
Severance Pay:	\$ _____	\$ _____
Interest and dividend income:	\$ _____	\$ _____
Alimony Received:	\$ _____	\$ _____
Business and/or Farm income:	\$ _____	\$ _____
Partnership and/or S-Corporation income:	\$ _____	\$ _____
Capital Gains:	\$ _____	\$ _____
Pensions and Annuities:	\$ _____	\$ _____
Rents and Royalties:	\$ _____	\$ _____
Unemployment Compensation:	\$ _____	\$ _____
Other Taxable Income	\$ _____	\$ _____
Social Security Benefits for ALL family members:	\$ _____	\$ _____
Worker's Compensation:	\$ _____	\$ _____
Retirement and/or Disability Benefits:	\$ _____	\$ _____
Welfare Benefits, including TANF:	\$ _____	\$ _____
Untaxed portion of pensions and/or annuities:	\$ _____	\$ _____
Living and housing allowance for clergy/military:	\$ _____	\$ _____
Child Support received for ALL children:	\$ _____	\$ _____
Veteran's non-educational benefits:	\$ _____	\$ _____
Deductible IRA/Keogh payments:	\$ _____	\$ _____
Other Untaxed income: Source: _____	\$ _____	\$ _____
Cash received, or money paid you your behalf:	\$ _____	\$ _____
Total:	\$ _____	\$ _____

Certification:

The amounts indicated above are the best and most comprehensive projection of my (our) income from all sources for the 2009 Calendar year. I expect my (our) 2009 tax return, when filed, to be in line with these estimates. I understand that my (our) 2009 tax return will need to be provided to the OSFA in early 2010.

(At least one parent must sign with dependent student's signature.)

Student's Signature

Father's Signature

Spouse's Signature

Mother's Signature