



SPECIAL CIRCUMSTANCES FORM 2011-2012 Academic Year

You have indicated there are circumstances that you would like the Office of Student Financial Planning to review as we process your financial aid. Follow the steps below and return this form with the appropriate documentation to our office. Once you have done so you must call our office and make an appointment for yourself and/or your parents to discuss your circumstances with the Director of Student Financial Planning. You may confer with the Director in person or by phone.

The information you provide on this form will be reviewed to determine if adjustments to your FAFSA can be made. You will be notified of the decision by the Office of Student Financial Planning. All decisions made by the Office of Student Financial Planning concerning special circumstances are final. If you have questions, please contact the Office of Student Financial Planning at (731) 661-5015.

- File the 2011-2012 FAFSA at www.fafsa.gov
- Complete this Special Circumstances form and attach documentation required in Section B.
- Attach a detailed letter documenting your circumstances.
- Attach a signed copy of your and your parent's (if dependent) 2010 tax returns.
- Complete and attach the 2011-2012 Verification form found at <http://www.uu.edu/financialaid/>
- Submit this form with attachments to the Office of Student Financial Planning of Union University.

Section A – Student Information

NAME _____ UNION ID OR SSN _____

ADDRESS _____ CITY, STATE, ZIP _____ PHONE _____

PARENT(S) WHOSE INFORMATION WAS PROVIDED ON YOUR FAFSA:

MOTHER'S (STEPMOTHER'S) NAME _____ DAYTIME PHONE _____

FATHER'S (STEPFATHER'S) NAME _____ DAYTIME PHONE _____

Section B – Special Circumstances – Check all that apply

From the list provided, indicate the reason for the requested review of your family's financial situation.

Loss of a Job, or Parental Loss of Job

- Separation Notice/ Termination Notice or documentation from employer showing effective date of termination.
- Documentation of severance package (if one exists).
- Statement of Unemployment Benefits and effective dates.

Loss of Untaxed Income

- Loss of Social Security Benefits
 - Provide notification of termination of SS benefits.
- Loss of Child Support
 - Provide court documentation stating the date of termination of child support.
- Loss of Worker's Compensation
 - Provide appropriate official documentation stating date of termination of Worker's Compensation benefits.
- Other. Please specify and provide appropriate documentation.

Loss of Taxable Income

- Loss of Alimony
 - Provide court documentation stating the date of termination of alimony.
- Loss of Unemployment Benefits

- Provide appropriate letter from the unemployment office stating date of termination of unemployment benefits
- Other. Please specify and provide appropriate documentation.

Excessive Medical Expenses

Payments made out of pocket beyond what your insurance covers. Do not include insurance premium costs. Provide both of the following:

- Provide bills showing the excessive medical expenses.
- Provide proof of personal payment of the expenses (check stubs, receipts, etc)

Lump sum (one-time) income

This could include, but is not limited to inheritance, moving expense allowance, lump sum retirement payments, etc.

- Provide appropriate documentation identifying the amount and type of lump-sum income and how the funds were spent or invested.

Other Circumstances.

Please list _____

Section C - Income Assessment Form – Please complete the table(s) below to help us assess your actual income for 2011. Report all income you expect to receive through December 31, 2011 in the appropriate boxes. You must include documentation supporting all income. This documentation could include but is not limited to:

- Recent pay stubs showing year-to-date earnings (since January 1, 2011) OR
- A letter from your employer stating total 2011 projected and or actual earnings
- W-2 Forms

If you are submitting the request for consideration after December 31, 2011, you must submit a copy of your completed 2011 federal income tax return.

STUDENT INCOME AND ASSET INFORMATION

Income For 2011 (January 1 To December 31)	Actual 1-1-11 To Today	Estimated Today To 12-31-11	Total = Actual + Estimated
STUDENT: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
SPOUSE: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other Taxable income: (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains) SOURCE:	\$	\$	\$
Social Security benefits	\$	\$	\$
Child support received	\$	\$	\$
Other untaxed income: (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc) SOURCE:	\$	\$	\$
Total student and/or spouse income for 2011	\$	\$	\$

Please list the net worth of the student's current assets (*Net Worth means market value of the asset minus debt on the asset*).

- Current amount of cash, savings, and checking: \$ _____
- Current net worth of investments/real estate (other than home): \$ _____
- Current net worth of farm or business: \$ _____

Dependent students who were required to enter parental information on the FAFSA must complete the remainder of this form. Independent students please skip the Parent Income and Asset Information and complete the Certification and Signature.

PARENT INCOME AND ASSET INFORMATION

Income For 2011 (January 1 To December 31)	Actual 1-1-11 To Today	Estimated Today To 12-31-11	Total = Actual + Estimated
MOTHER: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
FATHER: expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other Taxable income: (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains) SOURCE:	\$	\$	\$
Social Security Benefits	\$	\$	\$
Child Support Received	\$	\$	\$
Other untaxed income: (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc) SOURCE:	\$	\$	\$
Total parental income for 2011	\$	\$	\$

Please list the net worth of the parents' current assets (*Net Worth means market value of the asset minus debt on the asset*).

- Current amount of cash, savings, and checking: \$ _____
- Current net worth of investments/real estate (other than home): \$ _____
- Current net worth of farm or business: \$ _____

Part 3 - Certification and Signature

My signature below certifies that the information I have provided on this form is true. I agree to provide proof of the information if and/or when requested. I understand that the penalty for providing false or misleading information is a \$10,000 fine, a prison sentence, or both.

Student Signature _____ Date _____

Parent Signature _____ Date _____

Spouse of Student Signature _____ Date _____

FOR OFFICE USE ONLY

_____ Student Not Eligible _____ Request Approved _____ Request Denied

Comments _____

FA Administrator _____ Date _____

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