

This form is used to request special consideration based on significant changes to the parent’s financial circumstances as reported on the 2009-2010 FAFSA. Please read the listed categories and check the one most applicable to you. You must explain your circumstances in detail on this form and attach documentation confirming the situation. Your request will be reviewed within three weeks of submission, if all other processes are complete.

STUDENT NAME: \_\_\_\_\_ SSN or Student ID # \_\_\_\_\_

PARENT NAME: \_\_\_\_\_ Student Date of Birth: \_\_\_\_\_

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

EMAIL: \_\_\_\_\_ Phone: \_\_\_\_\_

**BASIS FOR APPEAL:** (Check all that apply and explain circumstances on reverse side)

- \_\_\_ A. A parent/stepparent has lost his/her job. Last date of employment: \_\_\_/\_\_\_/\_\_\_\_. (Attach copy of last pay stub)
- \_\_\_ B. A parent/stepparent can no longer work due to a disability. Last date of employment: \_\_\_/\_\_\_/\_\_\_\_. (Attach copy of last pay stub)
- \_\_\_ C. A parent/stepparent who received unemployment compensation or other untaxed income or benefit has completely lost that income. Date income was terminated: \_\_\_/\_\_\_/\_\_\_\_.
- \_\_\_ D. After applying for financial aid my parents/stepparents were separated or divorced. Date of separation/divorce (if different from date of separation) \_\_\_/\_\_\_/\_\_\_\_. (Attach divorce decree or verification of filing for divorce)
- \_\_\_ E. After applying for financial aid my parent/stepparent died. Date parent/stepparent died: \_\_\_/\_\_\_/\_\_\_\_. (Attach copy of death certificate)
- \_\_\_ F. High medical expenses were/are incurred by household. (Provide copies of medical expenses paid)
- \_\_\_ G. Other, please specify: \_\_\_\_\_.

**SECTION A: (TO BE COMPLETED BY ALL APPLICANTS).**

Estimate annual income for the 2009 calendar year. Do not use monthly amounts.

1. Number of family members in your household from July 1, 2009, until June 30, 2010: \_\_\_\_\_
2. Number of family members in college (at least half-time) from July 1, 2009, until June 30, 2010: \_\_\_\_\_
3. Father's expected 2009 income earned from work: \$ \_\_\_\_\_ Unemployment Compensation: \$ \_\_\_\_\_  
(attach recent or last pay stub) (attach benefits statement)
4. Mother's expected 2009 income earned from work: \$ \_\_\_\_\_ Unemployment Compensation: \$ \_\_\_\_\_  
(attach recent or last pay stub) (attach benefits statement)
5. Expected 2009 other taxable income: \$ \_\_\_\_\_ Source: pension/interest/dividends/other: \_\_\_\_\_ (circle one)
6. Expected 2009 untaxed income:  

Social Security: \$ _____	FIA/State Assistance: \$ _____
Untaxed pension or disability income: \$ _____	Child Support received: \$ _____
(month/year)	
Other (list amount): \$ _____	Source: housing allowance/workman’s compensation/other: (circle one)\$ _____

(SEE REVERSE SIDE)



**THIS COMPLETED FORM MUST BE TURNED IN WITH YOUR REQUEST FOR SPECIAL CONSIDERATION IF YOU HAVE NOT ALREADY COMPLETED ONE FOR THIS YEAR!**

Your application was selected for review in a process called "Verification" which is required under Federal Financial Aid Program rules (CFR Title 34, Part 668). In this process we will be comparing information from your application with **signed copies of your 2008 federal tax forms and your parent(s)' 2008 federal tax forms, along with W-2s** or other financial documents. Federal regulations mandate that we collect this information before awarding federal aid. If there are any differences between your application information and your financial documents there may be a need to submit corrections to your Student Aid Report (SAR). Corrections are submitted electronically and your information is then reprocessed. Please complete the verification requirements as soon as possible so that your financial aid will not be delayed. Contact the Office of Scholarships & Financial Aid for any assistance.

**What you should do:**

- Collect all 2008 **federal** tax documents pertaining to you and your parent(s)/step-parent.
- Talk to your financial aid administrator if you have questions about completing this worksheet.
- Complete and **sign** the worksheet. **A parent/step-parent must also sign the worksheet.**
- Send this completed and **signed** worksheet, and **signed** 2008 federal tax forms and W-2 forms to the Financial Aid Office.

A financial aid administrator will verify the information on the documents. If corrections are needed, the Financial Aid Office will make them unless additional information is needed; in which case you will be contacted.

Student Last Name	First Name	M.I.	Student ID # or SSN
Permanent Address (include Apt. No.)			Date of Birth
City	State	Zip Code	Phone Number (include area code)

**I. Family Information**

List the people in your **parent(s)' household**. **Include name, age, relationship, and name of college attending, if any: Include your parent(s) and step-parent;**

**Include siblings and step-siblings**, if (a) the children live in your parent's house, (b) your parents will provide more than half of the children's support from July 1, 2009 through June 30, 2010, or (c) the children would be required to provide parental information when applying for Federal Student Aid;

**Include other people** if they now live with your parent(s), and your parent(s) provide more than half of their support **and will continue** to provide more than half of their support from July 1, 2009, through June 30, 2010.

**Exclude foster children.**

**Be sure to complete ALL boxes for each household member. Form will be returned if left blank**

Family Member's Name	Age	Relationship	Name of College (if enrolled at least ½ time between July 2009 and June 2010)
Student's Name		Self	FERRIS STATE UNIVERSITY

SSN or Student ID # \_\_\_\_\_

**II. Tax Forms and Income Information**

All 2008 federal tax filers must provide one of the following: 1040, 1040A, or 1040EZ, a tax return from Puerto Rico, or a foreign income tax return. If you did not keep a copy of the tax return, request a transcript (Form 4506-T) from the Internal Revenue Service at (800) 829-1040 or a copy from your tax preparer. **ALL TAX FORMS MUST HAVE THE TAX FILER'S SIGNATURE.** Taxes received without signatures will be returned.

Check all that apply:

- I, the student, \_\_\_\_\_ have attached a copy of my signed federal tax return and a copy of my W-2 form.  
 \_\_\_\_\_ did work in 2008, but did not and will not file federal taxes. I have attached a copy of my W-2 form(s).  
 \_\_\_\_\_ did NOT work in 2008. I did not and will not file a federal income tax return.

My parent(s) \_\_\_\_\_ have attached a copy of their signed federal tax return and a copy of their W-2 form(s) or Schedule C, if self-employed. (If your parents filed separately, they must submit a copy of each tax return and a copy of all W-2 forms).

\_\_\_\_\_ did work in 2008, but did not and will not file federal taxes. My parents have attached their W-2 forms.

\_\_\_\_\_ did NOT work in 2008. My parents did not and will not file a federal income tax return.

Please note: If the student and/or parent has filed an extension form 4868, please submit a copy of that form along with the W-2 forms or a signed statement certifying the amount of adjusted gross income by self-employed tax payer. Your financial aid estimate will be cancelled if a copy of your tax return is not received by October 15th.

**III. Everyone: Please answer the following questions:**

If your parent(s) own a small business, do they employ more than 100 full-time employees? \_\_\_\_\_

If yes, you must list a value for that business. \$ \_\_\_\_\_

What is the current net value of your parent(s)' investments? This includes qualified educational savings accounts, real estate (but not the home you live in), trust funds, CD's, stocks, bonds, etc. \$ \_\_\_\_\_.

If your parent(s) pay child support, how much was paid annually in 2008? \$ \_\_\_\_\_. Children's names for which support was paid: \_\_\_\_\_.

IV. List exact amounts of untaxed income received in 2008 by the student and parent(s). Include any amounts received by parent(s) for all dependents. **If not applicable enter N/A or "0" in each box. Blank forms will be returned for completion.**

	Student	Parent(s)
Yearly Child Support received for all children in the household. Do not include support for foster children.		
401k/403b, Retirement Contributions (See Box 12a-d of W-2 form)		
Housing allowance. (clergy, military, etc)		
Money paid on your behalf and source of income.		

**V. Sign This Form**

By signing this form, I certify that all of the above information is complete and correct. **At least one parent must sign.**

 \_\_\_\_\_  
 STUDENT SIGNATURE

 \_\_\_\_\_  
 DATE

 \_\_\_\_\_  
 PARENT SIGNATURE

 \_\_\_\_\_  
 DATE