SPECIAL CIRCUMSTANCES APPEAL FORM

The Office of Financial Aid

***Submit this worksheet and your documentation by email to* finaidforms@roosevelt.edu or by fax: (312) 341-3545**

Student Name: _____ ID#: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone #: _____ Email address: _____

Recognizing that special circumstances exist, the Financial Aid Office will re-evaluate, upon request, your financial aid eligibility. Please indicate below your reason for a re-evaluation and **submit signed copies of your (spouse or parents) most recent IRS Tax Return Transcript and W2's.**

Submission Deadlines: Fall: October 15th, Spring: March 15th and Summer: June 15th

Depending on the circumstance, various documents are needed to support your situation. Documentation must be thorough and complete. It is your responsibility to provide all needed documentation to support your special circumstance.

Attach a detailed statement explaining your circumstances. In addition, submit supporting documentation to verify your situation, i.e. death certificate of parent or spouse, legal separation or divorce decree, year to date pay stubs, disability income, statement of unemployment and/or letter from employer stating last date of employment. We will contact you if additional items are needed.

Projected Yearly Income *(Must Be Completed)*

	Parent(s) Dependent Student	Student	Spouse Independent Student
Gross earnings from work January until December			
Unemployment compensation			
Taxable Social Security benefits			
Other taxed income			
Child support received.			
Untaxed welfare/social security benefits			
Workers compensation			
Interest or dividend income			
Other			
TOTAL			

Needed documentation-Please check one:

☐ Reduction or Loss of Job*
A letter from the former employer and other supporting documentation. (i.e. Severance payment, Unemployment Benefits Statement, year to date paystubs)
(Must complete projected income worksheet.)

☐ Divorce/Separation
Divorce -copy of divorce documents and include signed copies of the Federal Tax returns.
Separation – Proof of legal separation.

☐ Disability of Student, Spouse, or Parent*
Statement from a physician as to the nature and condition of the disability and the date the disability began. Documentation of benefit amount.

☐ Recent Death of Spouse or Parent
A copy of an official death certificate.

☐ Loss of Unemployment benefits *
A statement from the unemployment agency detailing the amount of benefits received and date terminated. ***(Must complete projected income worksheet.)***

☐ Other – Please explain/summarize your circumstance in an attached letter
Please submit documentation that you believe is appropriate for your situation.

The financial aid office reserves the right to request additional documentation at its discretion. You will be notified if other items are needed.

*** *Submit signed copies of your (spouse or parents) most recent IRS Tax Return Transcript and W2's*.**

By signing this Special Circumstances Appeal form, I (we) certify that all of the information reported is complete and correct.

_____ _____
Student Signature Date

_____ _____
Parent Signature (Dependent Student) Date

_____ _____
Spouse Signature (Independent Student) Date

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