

Student Financial Services
Professional Judgment for Special Circumstances 2023-2024

I

STUDENT NAME _____ TECH. ID _____

Special Circumstances are situations beyond an individual's control that the income reported on the 2023-2024 FAFSA. Below are listed the situations for which adjustments to your financial aid application may be possible.

PLEASE INDICATE THE SITUATION(S) THAT APPLY AND SUBMIT WITH DOCUMENTATION ATTACHED.

SECTION A

_____ You and/or your spouse's 2023 income has substantially decreased from the 2021 income as a result of a loss or change in employment due to extenuating circumstances for a period of 10 weeks or longer during 2023.

Documents required:

- A personal statement explaining your situation.
- Complete Section B of Special Circumstances Form
- Letter or document from previous employer on letterhead indicating dates of employment.
- The most recent pay stub indicating year-to-date earnings.
- If unemployed, a copy of the most recent unemployment compensation statement. If you are not receiving unemployment compensation please address this in your personal statement and provide copy of denial notice.

_____ You and/or your spouse have suffered a loss or reduction in an untaxed income or benefit which was received in 2021.

Documents required:

- A personal statement explaining your situation.
- Complete Section B of Special Circumstances Form.
- Letter or document from the agency/organization from which the benefit was received indicating the last date the benefit was received or reduced.
- In the case of the loss of child support, a copy of the divorce decree is required.
- Total amount of untaxed income now expected for 2023 _____ Type _____.
- Date benefit stopped: _____.

_____ You have separated or divorced since the time you applied for Federal Student Aid.

Documents required:

- In the case of divorce, copy of divorce decree
- In the case of separation, a letter from an attorney indicating separation date.
- If 2021 taxes were filed jointly, please provide a signed copy of 2021 Federal Income Tax Return AND all applicable schedules and W-2's
- Total amount of Child Support expected (if any) for 2023 _____.
- Complete updated household size form Section C.

_____ Your spouse has deceased since the time you applied for Federal Student Aid.

Documents required:

- Copy of the death certificate or obituary notice.
- If 2021 taxes were filed jointly, please provide a signed copy of 2021 Federal Income Tax Returns AND all applicable schedules and W-2s.

_____ You and/or your spouse had excessive medical and dental expenses not covered by insurance.

- To consider expenses during the 2021 year, submit a copy of your 2021 IRS Schedule A, or receipts of medical expenses **paid by you in 2021.**
- To consider expenses during the 2023 year, submit a copy of your 2023 IRS Schedule A, or receipts of medical expenses **paid by you in 2023.**

_____ Distribution of 401K or similar, based on financial hardship, that is included in the 2021 adjusted gross income.

Documents required:

- Personal statement explaining your situation, how funds were utilized, and if any are remaining.
- Copies of receipts/payments detailing what distribution funds were used for.
- Signed copy of 2021 Income Tax Return and ALL IRS 1099R forms.

_____ Other: Personal Statement and supporting documentation required.

SECTION B

2023 INCOME PROJECTIONS (for student/spouse loss of income)

Please provide your most recent paystub for all jobs worked (spouse included, if married) from January 1, 2023 to the present. Estimate expected income from the present until December 31, 2023.

**** If submitting this request after the Fall 2023 term has ended, please attach a copy of your 2023 Federal Income Tax Return and W-2's.****

Wages, salaries, tips, unemployment, and all other taxable income (do not include financial aid or wages earned through work-study employment).

	1/1/2023 to present	+	the present to 12/31/2023	=	2023 taxable total
Student Income	\$ _____	+	\$ _____	=	\$ _____
Spouse Income	\$ _____	+	\$ _____	=	\$ _____

Untaxed income (child support, payments to tax-deferred pension and savings plans, untaxed portions of IRA distributions, worker's compensation, other untaxed income). PLEASE SPECIFY: _____

	1/1/2023 to present	+	the present to 12/31/2023	=	2023 untaxed total
Student	\$ _____	+	\$ _____	=	\$ _____
Spouse	\$ _____	+	\$ _____	=	\$ _____

SECTION C (only if you have become divorced or separated)

Please list all **current** household members, including yourself below.

Name	Birth Date	Relationship to Student	College Attending 2023-2024
<i>John Smith (example)</i>	<i>12/31/9999</i>	<i>Self</i>	<i>Central University</i>
1.		Self	
2.			
3.			
4.			
5.			
6.			
7.			
8.			

The information and projections are true to the best of my/our knowledge. I/we understand that no adjustments will be made to the financial aid application without the appropriate supporting documentation.

STUDENT SIGNATURE _____

DATE _____

SPOUSE SIGNATURE _____

DATE _____

Return by mail to:

Student Financial Services
Minnesota State University, Mankato OR
 120 Wigley Administration
 Mankato, MN 56001

Drop off at the Campus Hub
 117 Centennial Student Union
 Fax: 507-389-6410

Upload the completed signed form and all supporting documentation to: <https://link.mnsu.edu/upload>

A member of the Minnesota State Colleges and Universities System.

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