Special Circumstances
2013-14 Academic Year

Student Name: ___________________________  ID: ___________________________
               Last                     First                     SSN or UPS

Current Phone: ___________________________

This form is optional. You may use this form to report any extraordinary circumstances that impact your ability to contribute to your or to your dependent student’s educational expenses. Examples of Special Circumstances that could warrant review by the Financial Aid Committee include: loss/reduction of income, high medical/dental expenses paid out of pocket (not reimbursed by insurance or other benefits), tuition expenses for siblings enrolled in private K-12 school, PLUS loan payments, or parent educational loan payments.

Please note that changes made by the Financial Aid Committee may or may not increase a student’s financial aid package.

A. Parent - Reduction of Income
Complete this section if your parent’s income will decrease significantly in 2013 compared to the 2012 calendar year. Please attach a 2012 IRS Tax Return Transcript.

Estimated Income 01/01/13 - 12/31/13

Income earned from work by Father (Stepfather) $___________
Income earned from work by Mother (Stepmother) $___________
Other taxable income (interest/dividends, capital gains, unemployment, etc.) $___________
Non-taxable income and benefits (TANF, military benefits, child support, etc.) $___________

B. Independent Student or Spouse - Reduction of Income
Complete this section if your or your spouse’s income will decrease significantly in 2013 compared to the 2012 calendar year. Do not include expected earnings from a Federal or State Work-Study job. Please attach a 2012 IRS Tax Return Transcript.

Estimated Income 01/01/13 - 12/31/13

Income earned from work by you $___________
Income earned from work by your spouse $___________
Other taxable income (interest/dividends, capital gains, unemployment, etc.) $___________
Non-taxable income and benefits (TANF, military benefits, child support, etc.) $___________

(Continued on Reverse)
C. **Explanation for the Reduction of Income**
   Please explain the reason(s) for the reduction in income as listed in Section A and/or B.

   **Please attach a 2012 IRS Tax Return Transcript.**

D. **Other Extraordinary Circumstances**
   Please explain, in detail with exact dollar amounts, any other circumstances that you wish to have considered.

   (tuition expenses at a private elementary or secondary school, high out of pocket medical or dental expenses not covered by insurance, PLUS loan payments, parent’s education loan payments, etc.)

   IMPORTANT: Private tuition expenses must be accompanied by a copy of the invoice. If you do not yet have an invoice, you may submit a statement from the school or an invoice from the previous year.

   **Please attach a 2012 IRS Tax Return Transcript.**

Student Signature: ___________________________________ Date: ____________

Parent or Spouse Signature: _______________________________ Date: ____________
IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their 2012 Tax Return from the IRS in one of two ways.

**Option 1: Online**
- Click **Order a Return or Account Transcript** located under Tools
- Click **Order a Transcript** under Step 3
- Enter your SSN, Date of Birth, Street Address, and Zip Code
- Select **Return Transcript** for Tax Year 2012
- You can expect to receive your Tax Return Transcript within 5 to 10 days from the time the IRS receives your request. Please mail in your Tax Return Transcript with the verification worksheet.

**Option 2: Telephone Request**
- Call 1-800-908-9946
- Select **Option 2** to request a Tax Return Transcript and then enter 2012

*Please note - Student Financial Services will ONLY be accepting copies of official tax transcripts. Our office is no longer allowed to accept copies of the federal tax returns filed.*