

2023-2024 Financial Aid Appeal Form

The Financial Aid Office reviews each family's ability to contribute towards educational costs and provides a financial aid package based upon the information reported on the FAFSA, CSS Profile, and submitted tax documents. However, when circumstances arise that can significantly impact a family's ability to contribute, students may request a review of their financial aid eligibility. This can occur due to a change in the family's financial circumstances, new information regarding unusual situations the family may be facing, or information that has changed significantly from the initial application.

Please note, we will not consider private secondary school tuition, credit card bills, car payments, previous educational loan debt, or other colleges' offers of financial aid.

Some common appeal reasons include:

- Loss of income
- Significant unreimbursed medical expenses
- Unemployment
- Untaxed income or benefits have ended
- One-time capital gain or distribution
- Death of parent(s)

Instructions

1. Complete all necessary sections as completely as possible.
2. In addition to this form, submit any substantiating documentation along with a copy of your 2021 and 2022 tax returns and W2s once available. Please only submit the following three pages of this form; we do not need this first page.
3. Documentation should be uploaded using the College Board's IDOC document imaging service at <http://idoc.collegeboard.org/>. Please be sure to let us know once the documentation is uploaded so we know to review it.

Please DO NOT email the documentation to our office.

Once all documentation is received, the appeal will be reviewed by our office appeal committee. In the event additional information or documentation is required during the review process, we will reach out. Please know that, while we certainly recognize families can face demanding and intractable circumstances, we are unfortunately unable to respond favorably to every appeal. Appeals are reviewed on a case-by-case basis, and decisions depend on availability of funding, among other variables.

Response time will vary based on our volume at the time the request is received. All decisions will be communicated in writing, and if changes are made to the financial aid offer, the student will receive a revised notification. Appeal committee decisions are final.

****** Please keep this page for your records ******

2023-2024 Financial Aid Appeal Form

Name of Student (Last, First, MI)

Graduation Year

College Board FinAid ID

Section 1: Appeal Circumstances

Instructions

Check the box below that most accurately describes your situation. You may check more than one if appropriate.

Loss of income. Be sure to submit copies of your 2022 W2s, federal tax returns, and any schedules.

Parent is currently unemployed. Date employment ended:

Attach documentation of severance and/or unemployment benefits as well as most recent pay stubs for each parent.

Untaxed income or benefits received have ended. Date of termination:

Attach documentation from the agency providing the benefits.

Extraordinary unreimbursed medical and/or dental expenses. Amount for 2021 calendar year:

Attach a detailed letter and supporting documentation of the expenses.

One-time capital gain or distribution. Please provide details below. Please note that both the circumstances and the capital gain/distribution must be one-time occurrences, which did NOT occur in 2020, and are not expected again in 2022.

Death of a parent. Date:

Attach documentation of any death benefits received.

I have emergency expenses due to COVID-19. Please explain in the space below.

If none of the above categories describes your family's situation, or if you need to provide additional information, particularly about additional expenses due to COVID, include an explanation of your circumstances with as much detail and documentation as possible in the following box. *Please limit your response to 2000 characters. If more space is needed, please attach a separate sheet.*

Section 2: Estimated Year Income

| 2022 Gross Taxable Income | Parent 1 Income | Parent 2 Income |
|----------------------------------------------------------------------------------|------------------------|------------------------|
| Wages, salaries, tips | | |
| Severance pay | | |
| IRA/pension/annuity distribution | | |
| Interest and dividend income | | |
| Business or farm income | | |
| Income received from rents after expenses paid by mortgage, taxes, and insurance | | |
| Capital gains | | |
| Unemployment compensation | | |
| Any other taxable income | | |
| Total 2022 gross taxable income | | |

| 2022 Gross Untaxed Income | Parent 1 Income | Parent 2 Income |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|------------------------|
| Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings). Includes untaxed portion of 401(K) and 403(B) plans | | |
| Social Security benefits (SSI or disability) received by the parents plus the benefits received for the student and other children | | |
| Retirement or disability benefits | | |
| Worker's compensation | | |
| Welfare benefits, including AFDC | | |
| Untaxed portion of IRA/pension/annuity | | |
| Living and housing allowances (excluding rent subsidies for low income housing) for clergy, military, and others (including cash payments or cash value of benefits) | | |
| Child support or maintenance payments which will be received for the student and other children (including cash support or money paid on student's behalf from non-custodial parent) | | |
| VA benefits, excluding educational benefits received by the student | | |

| | | |
|------------------------------------------------------------------------------------------------------|--|--|
| Railroad retirement benefits | | |
| Job Training Partnership Act (JTPA) non-educational benefits | | |
| Any other untaxed income and benefits such as alimony, Black Lung Benefits, refugee assistance, etc. | | |
| Total 2022 gross untaxed income | | |

Section 3: Signatures

I/We hereby swear or affirm that the information reported on this form is true, complete, and accurate to the best of my knowledge. I/We understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

I/We also acknowledge that any decision made using these numbers will be based on estimated 2022 figures. I/We will submit the 2022 tax returns and W2s once they are ready, and if there are significant discrepancies between the estimated figures and the tax returns, the financial aid package will be adjusted accordingly.

Student Signature

Date

Parent Signature

Date