

SPECIAL CIRCUMSTANCES PETITION

2013-2014

COMPLETE ALL SECTIONS: Please complete the form in ink and print legibly

Federal regulations require the Financial Aid Office to use 2012 financial information from the FAFSA when determining financial need for the 2013-2014 school year. This form may be used if you feel that the FAFSA does not adequately reflect your current financial condition. *Please note, that an approval of a Special Circumstance Petition does not guarantee coverage of charges.*

Please complete all sections of this petition that pertain to your appeal and return it to Concordia's Financial Aid Office with required documentation. **All Special Circumstances must be accompanied with a letter of explanation as to why and when the changes took place, and with appropriate supporting documentation.** *Note: ALL Documentation MUST be submitted with this petition, or your request cannot be processed.* Submission does NOT guarantee an adjustment will be made to your financial aid amount. All appeals are reviewed on a case-by-case basis according to the guidelines set forth by the U.S. Department of Education, as we are limited and bound by regulation.

You will receive an initial response to your petition within 10 business days. The estimated entire completion may take up to 8 weeks. Please view the student's MyRecords account for any additional documents requested.

SECTION 1: Student and Parent Information

Concordia Student's Last, First, MI	E Student CU ID Number	Student Telephone Number
Parent Appealing Last, First, MI	Parent Telephone Number	Parent Email Address
Other Parent Last, First, MI		

SECTION 2: Check all that apply

Loss of income due to non-disability related unemployment – Student, spouse, or parent(s) has lost employment (due to layoff, termination or voluntary resignation) since the last tax year reported on most recent FAFSA.

Acceptable Documentation:

- Letter explaining special circumstance
- Documentation of loss of employment (to include any severance package/ letter from employer on company letter)
- Copy of unemployment check(s) or and or last pay stubs (or letter stating that unemployment was denied)
- Paystub from former employer
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

Loss of income due to disability – Student, spouse, or parent(s) has not been able to earn money the way it was earned in the last tax year reported on the FAFSA.

Acceptable Documentation:

- Letter explaining special circumstance
- Documentation of loss of earnings (such as a signed letter from employer on company letterhead)
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)
- Approval/Denial letters for disability

Loss of untaxed income or benefits - Student, spouse, or parent(s) has lost untaxed earnings (such as child support, Worker's Compensation, etc.) since the last tax year reported on most recent FAFSA.

Acceptable Documentation:

- Letter explaining special circumstance
- Documentation of loss of untaxed income or benefits (court decisions, letters of denial of benefits, etc.)
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student) unless

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_____ **Occurrence of one-time income** - Student, spouse, or parent(s) received a one-time lump sum (such as inheritance, retirement, IRA distribution, etc.) that was reported on the 2013-2014 FAFSA but is not expected in the future.

Acceptable Documentation:

- Letter explaining special circumstance
- Documentation of one-time income (legal forms, financial statements, etc.)
- Documentation supporting how the funds were spent or invested
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Separation or divorce** – Student (or your parents, if dependent) have separated or become divorced since the time the FAFSA was filed.

Acceptable Documentation:

- Legal documentation of separation or divorce (such as court decisions or divorce decree)
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Death** – Your spouse (or parent if dependent) received income for the most recently reported tax year, but passed away after you completed the FAFSA.

Acceptable Documentation:

- Legal documentation of death (such as a copy of death certificate)
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Elementary or secondary school tuition costs for siblings** – You or your parents are paying private elementary and/or secondary school tuition costs for the upcoming school year for dependent children.

Acceptable Documentation:

- Written contract that states the amount of tuition paid or due for the upcoming school year
- or*
- Signed letter from the school stating the amount of tuition paid or due for the upcoming school year on official school letterhead
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Medical or dental expenses** – You or your parents paid medical or dental expenses not covered by insurance during 2012, amount must exceed your standard medical deduction on Federal Tax return to be considered.

Acceptable Documentation:

- Letter explaining special circumstance
- Proof of payment used to pay out-of-pocket medical or dental expenses
- Confirmation of amount paid out-of-pocket by you during 2012 and purpose of expense (amounts billed will not be considered without proof of payment).
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Elder/ Dependency Rehabilitation Expenses-** You or your parents pay nursing home expenses not covered by insurance.

Acceptable Documentation:

- Letter explaining special circumstance
- Proof of payment used to pay out-of-pocket nursing home expenses
- Confirmation of amount paid out-of-pocket by you during 2012
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Child Care Costs-** You or your parents have unusually high dependent care expenses.

Acceptable Documentation:

- Letter explaining special circumstance
- Proof of payment used to pay dependent care expenses
- Confirmation of amount paid by you during 2012
- Completed 2013-2014 Verification Worksheet (Dependent or Independent)
- 2012 Federal Tax Transcripts and W2s (parents & student)

_____ **Other – Circumstances not otherwise listed: Effective date:** _____ **(additional information will be requested)**

Briefly Explain: _____

Estimated 2013 Income

Provide your best estimate of the amounts you will receive from all sources (include taxable and non-taxable income) from January 1, 2013 to December 31, 2013. If completing this form after 12/31/2013, please provide calendar year 2013 totals only.

Parent(s) Information (Dependent Students Only)

Please indicate amounts for each category of income below. If no income in a category, write '0'	Actual from 1/1/2013 to today	Projected from today thru 12/31/2013	Projected total for year 2013
Taxable Income			
Father's Earnings from Work (attach most recent pay stub)			
Mother's Earnings from Work (attach most recent pay stub)			
Unemployment Compensation: circle Father or Mother			
Ira Distributions (taxable portion only)			
Severance Pay: circle Father or Mother (attach last pay stub)			
Vacation & Sick Pay: circle Father or Mother			
Total Taxable Income			
Untaxed Income			
Tax exempt interests			
Child support received			
Worker's compensation/ Disability Benefits: circle Father or Mother			
Other (describe):			
Total Untaxed Income			

Students Information (and student spouse, if married)

Please indicate amounts for each category of income below. If no income in a category, write '0'	Actual from 1/1/2013 to today	Projected from today thru 12/31/2013	Projected total for year 2013
Taxable Income			
Student Earnings from Work (attach most recent pay stub)			
Spouse Earnings from Work (attach most recent pay stub)			
Unemployment Compensation: circle Student or Spouse			
Ira Distributions (taxable portion only)			
Severance Pay: circle Student or Spouse (attach last pay stub)			
Vacation & Sick Pay: circle Student or Spouse			
Total Taxable Income			
Untaxed Income			
Tax exempt interests			
Child support received			
Worker's compensation/ Disability Benefits: circle Student or Spouse			
Other (describe):			
Total Untaxed Income			

SECTION 3: Certification Statement

I/We certify that the information on this form is true, complete, and correct to the best of my/our knowledge. I/we understand that false statements or misrepresentations are cause for denial, reductions, withdrawal, and/or repayment of financial aid. I/we also understand that this information will be used in accordance with Federal guidelines and may or may not result in adjustments to the student's financial aid eligibility.

_____	_____	_____	_____
Student Signature (Independent only)	Date	Spouse Signature (if married)	Date
_____	_____	_____	_____
Parent Signature	Date	Parent Signature (as appropriate)	Date

**Submit form with all supporting documents to:
Include student's name and ID number**

Concordia University, Financial Aid Office
1530 Concordia West, Irvine, CA 92612
FAX: 949.214.3500; Email: finaid@cui.edu;
Phone: 949.214.3066