

Alderson Broaddus University Financial Aid

2017-2018 Special Circumstance Review Request (Independent Student)

Student Name: _____

ID # of Last Four of SS# _____

The Free Application for Federal Student Aid (FAFSA) is the tool used to determine a student's need based financial aid. Circumstances may exist which are not reflected on the 2017-18 FAFSA. This form is designed to provide the FAO with some basic information regarding special circumstances that have occurred since you filed the FAFSA or unusual family circumstances not accounted for on the FAFSA. Please direct any questions regarding completing this Special Circumstance Questionnaire to the FAO at (304) 457-6354.

Here is how the Special Circumstance process works:

1. Complete and submit this form to provide the FAO with information regarding your special circumstance. **You will need to answer the questions based on 2017 calendar year** as this special circumstance request is for the 2017-18 academic year.
2. FAO will use this information to **estimate** if the information provided on this form appears that your special circumstance information:
 - (a) may change your EFC significantly enough that your financial aid package might be affected
 - (b) won't significantly change your EFC enough to affect your financial aid package
3. FAO will contact you via email within 14 business days to inform you of the estimated calculation based solely on this form
4. If the estimation results show that your special circumstance could **potentially change** your financial aid package, the FAO will give you further instruction at which time:
 - You must complete verification (if not already chosen by the Department of Education). Verification is a process that verifies the accuracy of the information on your FAFSA. It is important to note that verification could result in a reduction of financial aid should the information on the FAFSA be incorrect.
 - You will be asked to provide required documentation to substantiate the information on this form.

PLEASE COMPLETE THE FOLLOWING, SIGN AND SUBMIT TO THE FAO BY EMAIL – fa@ab.edu – OR FAX – 304-457-6391.

SECTION A: Please check which ONE circumstance below applies to you and you would like reviewed for 2017-18 award year.

MARK ONE	TYPE OF SPECIAL CIRCUMSTANCE REQUEST	PLEASE ANSWER FOR SPECIAL CIRCUMSTANCE CHOSEN	PLEASE ANSWER FOR SPECIAL CIRCUMSTANCE CHOSEN
	<p>LOSS OF EMPLOYMENT You or your spouse were employed in 2015 & have been unemployed for at least 10 weeks in 2017</p> <p><i>*Note – While FAO can do an estimate now, the final calculation for this circumstance will not occur until after April 1 to provide 3 months of unemployment and/or income history for 2017</i></p>	<p>Who was affected by loss of employment? <input type="checkbox"/> You <input type="checkbox"/> Spouse</p> <p>What was the YTD Gross Earnings in 2015 for the person affected?</p>	<p>What is the PROJECTED total of earnings from work AND any unemployment benefits for the ENTIRE 2017 YEAR for the person affected?</p>
	<p>PAY REDUCTION. You or your spouse are receiving less pay for 2017 than in 2015.</p> <p><i>*Note – While FAO can do an estimate now, the final calculation for this circumstance will not occur until after April 1 to provide 3 months of income history for 2017 for projections</i></p>	<p>Who was affected by pay reduction? <input type="checkbox"/> You <input type="checkbox"/> Spouse</p>	<p>What was the YTD Gross Earnings in 2015 for the person affected?</p> <p>What is the PROJECTED Gross Earnings for the ENTIRE 2017 YEAR for the person affected?</p>
	<p>DISABILITY Since submitting the FAFSA, you or your spouse have become disabled.</p>	<p>Who is now disabled? <input type="checkbox"/> You <input type="checkbox"/> Spouse</p> <p>What is date of disability?</p>	<p>What is the PROJECTED disability income and any earnings from work for the ENTIRE 2017 YEAR for the person affected?</p>
	<p>ONE TIME INCOME You or your spouse experienced a one-time income increase (i.e. capital gains, withdrawal from IRA or retirement benefits, etc.) in 2017 AND funds were spent on mitigating circumstances.</p>	<p>What is the source of the one time income?</p> <p>What was the amount of the one time income?</p>	<p>Please describe the mitigating circumstance(s) for which the funds were used by attaching a separate sheet</p>

MARK ONE	TYPE OF SPECIAL CIRCUMSTANCE REQUEST	PLEASE ANSWER FOR SPECIAL CIRCUMSTANCE CHOSEN	PLEASE ANSWER FOR SPECIAL CIRCUMSTANCE CHOSEN
	SEPARATION OR DIVORCE. Since submitting the FAFSA, you have separated or divorced.	Check one: I am as of today: _____ separated _____ divorced	What was the date of the separation or divorce? Do you now live in separate households?
	DEATH Since submitting the FAFSA, my spouse is deceased	What was the date of death?	
	EXTENDED FAMILY SUPPORT. You will contribute at least 50% support to others not counted as a member of your household on the FAFSA	How many members are now in the household?	What are the name(s) and relationship of household members? Attach separate sheet if necessary.
	MEDICAL EXPENSES <i>Note: There is an 11% Income Protection Allowance already built into the EFC formula for medical expenses. For a special circumstance to be considered – medical expenses that have been PAID out of pocket must be more than 11% of AGI</i>	Are 2017 medical expenses <u>PAID OUT OF POCKET</u> GREATER THAN 11% of Adjusted Gross Income (AGI)?	
	REDUCTION/LOSS OF CHILD SUPPORT	For which child(ren) was child support reduced or lost?	What was the date this change occurred?
	OTHER	If none of the above circumstances apply, please attach a statement explaining the special circumstances you are asking be considered	

SECTION B:

WARNING: If you purposely give false or misleading information you may be fined, sentenced to jail, or both.

By signing, I affirm that the information on this form is true and complete to the best of my knowledge.

As well, by signing below I understand:

- I may apply for only one Special Circumstance review each year.
- I may apply for each applicable circumstance only once during my student career at Alderson Broaddus University.
- The FAO will use the information provided on this form to **estimate** if the circumstance reported might change my Expected Family Contribution (EFC) significantly enough to qualify for additional financial aid. If so, the FAO will instruct me of the next steps which will include completing Verification and providing documentation.
- Completion of Verification could result in a lower financial aid package.
- Completion of the Special Circumstance process may not result in additional financial aid being awarded.

Student Signature

Date