

You have indicated that there are special circumstances in your family's financial situation which affect your ability to pay for your Xavier education. If you wish to have these reviewed, please select the appropriate circumstances. You may choose options from either Section A or Section B, but not both. Once completed submit this form along with all required documentation. **Please understand that filing this form may not necessarily result in an increase in your financial aid.**

Student's Name

Social Security Number

Daytime Phone Number

E-mail Address

Anyone requesting a special circumstances consideration must also complete a 2008-2009 Verification Worksheet and submit signed copies of parents' 2007 federal income tax returns (for dependent students) and student's 2007 federal income tax returns. Once all required documents are received, you will be contacted within 7-10 business days.

Please explain your family's special circumstances below:

(Attach additional page if needed)

A. The 2008-2009 FAFSA Does Not Accurately Reflect Your Available Income Because:

- Private School Tuition Paid (Elementary – High School)**
Required Documentation: Statement or letter from the school showing actual tuition amount **paid** for the 2007-2008 school year. Amount paid must be greater than \$7,500. **Do not include student(s) attending college in 2008-2009.**
- Medical/Dental Expenses not Covered by Insurance During 2007**
(In 2007 the family paid more than 11% of their adjusted gross income for medical or dental expenses.)
Required documentation: Copy of 2007 Schedule A from 1040 tax return.
- Divorce/Separation**
Required documentation: Copy of divorce/separation decree and W-2 forms for custodial parent.

B. Your Projected 2008 Income is Less than your 2007 Income because:

- Change in Employer; Loss of Job or Retirement from Job**
Required documentation: Statement from previous employer regarding last day of employment and benefits paid to employee in 2008 (i.e. severance, vacation, sick leave); copy of final pay stub; notice from Bureau of Employment Services stating eligibility for unemployment compensation (if applicable); letter from new employer (if applicable) indicating start date, pay rate, and a copy of the most recent pay stub; projected 2008 income below.
- Reduction/ Loss of Child Support, Social Security Benefits, or other Benefits Received**
Required documentation: Copy of notice of benefit termination or a copy of the court order which specifies when payments cease; complete projected 2008 income below.
- Receipt of a Lump Sum Payment in 2007 which will not be received in 2008**
Required documentation: Documentation of lump sum payment; explanation of how the lump sum payment was saved or spent; complete projected 2008 income below.
- Parent(s) in College during the 2008-2009 Academic Year**
Required documentation: Statement from college verifying parent's half-time enrollment in a degree seeking program, proof of payment, and letter from employer stating tuition assistance for year.
- Death of Parent whose Income is Reported on FAFSA**
Required documentation: Copy of death certificate or newspaper obituary.

Projected 2008 Income

	Mother (dependent students)	Father (dependent students)	Student	Spouse (independent students)
Gross earnings from work from 1/1/2008 until today				
Gross earnings from work from today until 12/31/2008				
Interest and/or dividend income				
Taxable pensions/annuities, IRA distributions				
Unemployment compensation				
Taxable social security benefits				
Other taxed income				
Tax exempt interest income				
Workers' compensation				
Child support received				
Contributions to tax-deferred IRA/pension/savings plans				
Untaxed welfare/social security benefits				
Other untaxed income				
TOTAL				

By signing this Special Circumstances Appeal Form, I (we) certify that all the information reported on this worksheet is complete and correct. I understand that this appeal will not be reviewed until all required documentation is submitted and the 2008-2009 FAFSA is on file with Xavier University. I (the student) authorize the Financial Aid Staff to discuss this matter with my parent(s) or guardian(s) whose information is included on this form.

Student Signature

Date

Parent Signature

Date

DO NOT WRITE BELOW THIS LINE

Revised AGI	_____	Revised federal tax	_____	Verified EFC	_____
Minus deductions (standard or itemized)	_____	Minus total tax credits	_____	New EFC	_____
Minus # of exemptions *3400	_____	New federal tax	_____	Date of Letter	_____
Taxable income	_____	FAA Initials	_____	<input type="checkbox"/> Approved	<input type="checkbox"/> Not Approved

2008-2009 Verification Worksheet

Federal Student Aid Programs

Your application was selected by the U.S. Dept. of Education for review in a process called "verification." In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and with signed copies of your 2007 federal tax forms (and your spouse's if you are married, or parents' if you are considered dependent for federal aid purposes). If there are differences between your application and the documents you've submitted, corrections may need to be made. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

What you should do:

1. Collect your (and your spouse's or parents') financial documents (signed Federal income tax forms, W-2, etc.).
2. **Complete all sections and sign the worksheet** – you (and your parent if you are required to provide their income information).
3. Contact us if you have questions about completing this worksheet.
4. Bring, mail, or fax the completed worksheet, tax forms, and any other documents to our office.
5. We will review the information on these documents and make corrections if necessary.

A. Student Information

<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Social Security Number</i>	
<i>Address (include apt. #)</i>		<i>City</i>	<i>State</i>	<i>Zip Code</i>
<i>Date of Birth</i>	<i>E-mail Address</i>		<i>Phone Number (include area code)</i>	

B. Family Information

- Independent Students:** List the people in your household, include: (a) yourself, and your spouse if you have one; and (b) your children, if you will provide more than half of their support from July 1, 2008 through June 30, 2009; and (c) other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.
- Dependent Students:** List the people in your parents' household, include: (a) yourself and your parent(s) (including stepparent) even if you don't live with your parents; and (b) your parents' other children, even if they don't live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2008 through June 30, 2009, or (2) the children would be required to provide parental information when applying for Federal student aid; and (c) other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2008 through June 30, 2009.

Write the names of all household members. Also write in the name of the college for any family member, excluding your parent(s), who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Example: Martha Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

C. Tax Forms and Income Information

- All tax filers must submit a **signed** copy of all 2007 Federal Income Tax returns which include the 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return for those people checked below:

You Your spouse Your father (step) Your mother (step)

If you did not keep a copy, call the IRS at 1-800-829-1040. Press "2- Refund or Personal Tax Account" then Press "2 – Personal Tax Account", follow the instructions until given the option to select a " tax return transcript", and then follow the instructions.

- Check the box for those people who did not and are not required to file a 2007 Federal Income Tax Return. List below your employer(s) and any income received in 2007 (use W-2 forms or other earning statements).

You Your spouse Your father (step) Your mother (step)

Name of Employer	Student Amount	Spouse or Parent(s) Amount

- Both tax filers and non-tax filers must list any untaxed income received in 2007. **Be sure to enter zeros if no funds were received.** (See Worksheets A and B of the Free Application for Federal Student Aid (FAFSA)). Failure to complete this section will delay the processing of your financial aid.

Student (spouse)	Calendar Year 2007	Parent(s) (step-parent)
	FAFSA WORKSHEET A:	
\$	Earned income credit from IRS Form 1040 - line 66a; 1040A - line 40a, 1040EZ - line 8a.	\$
\$	Additional child tax credit from IRS form 1040 – line 68 or 1040A – 41.	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	\$
\$	Social Security benefits received for all household members that were not taxed (such as SSI).	\$
	FAFSA WORKSHEET B:	
\$	Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on W-2 Form Box 12a - 12d, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS form 1040 – line 28 + line 32 or 1040A – line 17.	\$
\$	Child support received for all children. Don't include foster care.	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).	\$
\$	Veterans' non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowances.	\$
\$	Any other untaxed income or benefits, not reported elsewhere, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Don't include student aid, WIA educational benefits, or flexible spending	\$
\$	Cash or any money paid on your behalf (i.e. bills), not reported elsewhere on this form.	\$ XXXXXXXX

D. Sign This Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature Date _____

Parent's Signature (Dependent Students Only) Date _____