



2016-2017 Special Circumstances Request

Student Name: _____ SU ID Number: _____

As part of Samford University’s commitment to serve the needs of all our students as individuals, we offer this form as an opportunity for you to elaborate on your family’s needs and how any circumstances not taken into account on the Free Application for Federal Student Aid (FAFSA) may affect your financial aid eligibility. Every submitted request will be reviewed. Any changes made will be decided on a case-by-case basis. **Please note:** Submission of a request does not guarantee changes in financial aid, nor does it prevent any late fees from being applied to a student’s bill. All decisions are final.

In order to be eligible for review, a student is expected to have completed a FAFSA and taken advantage of all available financial aid options before submitting the request. If the timeframe in which the request is made is before aid is available to be accepted (i.e. early spring prior to upcoming fall term), it will be assumed that the student will accept all available aid options.

The following is a listing of what is considered a special circumstance: (check any that apply)

- Significant loss or reduction of employment, income, and or unemployment benefits for parent(s), spouse (if student is married), and/or student in calendar year 2016 only
- Bankruptcy or foreclosure in calendar year 2016 only
- Death of a parent or spouse (if student is married) in calendar year 2015 or 2016
- Separation or divorce of parent or spouse (if student is married) in calendar year 2015 or 2016
- College tuition paid for a parent or spouse (if student is married) in calendar year 2015 only
- Private primary and/or secondary school tuition and/or home school expenses paid in calendar year 2015 only
- Loss of child support received in calendar year 2015 or 2016
- Excessive med., dental, and/or pharma. expenses above what insurance covered in calendar year 2015 only
- Receipt of non-reoccurring income such as one-time payment from employer, retirement fund cash-out, moving expense reimbursement, IRA rollovers, receipt of illiquid assets, etc... in calendar year 2015 only
- Change in marital status for a student (***must be submitted before 10/15/2016***)
- Transportation costs in excess of what is allocated in the student’s cost of attendance budget
- Purchase of a computer for college use in the 2016-2017 aid year
- Childcare expenses during your term(s) of enrollment for the 2016-2017 academic year

The following do not constitute special circumstances:

- College expenses for siblings (taken into account on FAFSA)
- Reduction in 401K and/or other investments values
- Parents’ refusal to pay for college or sign for Parent PLUS loan
- Lack of credit worthy co-signers for education loans

Part A. Explanation of Special Circumstances

Please use the space below to fully explain your circumstances. Any claims of figures, dates, and the like must be corroborated with official documentation. Additional information may be requested. Attach a separate sheet if necessary.

Part B. Reduction of Income or Job Loss 2016

2016 Gross Income	Earned Income	+	Estimated Income	=	2016 Total Income
Wages, salaries, tips:					
<i>Father/Stepfather:</i>		+		=	
<i>Mother/Stepmother:</i>		+		=	
<i>Student (if applicable):</i>		+		=	
<i>Spouse (if applicable):</i>		+		=	
Net Income or loss from business or farm:		+		=	
Unemployment compensation		+		=	
Severance pay:		+		=	
Other taxable income:		+		=	

** Completing the above is required if claiming a loss in income due to job loss , job reduction, death of parent or spouse, and/or divorce or separation)*

Part C. Required Documentation

If making a request for review based on one of the following, please provide all documentation listed.

- Job loss or other loss of income between January 1, 2016 and December 31, 2016
 - Date of termination or reduction: _____ Date of new employment: _____
 - Statement from employer indicating date of employment termination or reduction in working hours/salary/wages
 - Copy of final pay stub from last employer(s) indicating final 2015 year-to-date earnings
 - Copy of most recent pay stub from employers indicating 2016 year-to-date earnings (if applicable)
 - Documentation of severance and/or unemployment benefits (if applicable)
- Bankruptcy or foreclosure
 - Official court documents outlining bankruptcy terms
 - Verification from lender holding mortgage stating status of property
- Death of parent or spouse in 2015 or 2016
 - Copy of death certificate
 - Copy of 2015 federal tax return transcript
 - Documentation of death benefits and life insurance payment
- Separation or Divorce in 2015 or 2016
 - Copy of court-filed legal separation document or divorce decree
 - Copy of federal 2015 tax return transcripts for parties involved
 - Full explanation in the space provided on page two of this form listing 1) date of divorce/separation, 2) list of current household members, 3) alimony and/or child support received per month and when payments began or are expected to begin
- College tuition paid for parent or spouse from January 1, 2015 to December 31, 2015
 - Copy of a 2015 1098T for each institution attended

Part C. Required Documentation (continued)

- Private school tuition and/or home school expenses
 - Letter on school letterhead from the business office of primary and /or secondary school indicating the amount of tuition charged and paid by family between January 1, 2015 and December 31, 2015. The amount of tuition charged should be comprised of tuition costs only. No meal plans, trip fees, book fees, participation fees, and other non-tuition expenses are to be included. The amount paid should not take into account scholarships received or payments made by individuals other than immediate family members. - In the space provided on page two of this form please provide the names, grades, ages, and schools attended for each student in the family. - Private college expenses will not be considered.
- Loss of child support received in 2015 or 2016
 - Copy of divorce decree listing court-ordered support.
 - In the space provided on page two of this form please provide explanation of why the child support will end and the date of last payment. Explanation should indicate whether or not child support will be received for other children in the household.
- Excessive medical, dental, and/or pharmaceutical expenses in 2015 above insurance coverage
 - Summary statement from provider indicating the date of service, name of patient, amount billed, amount paid by patient, and amount paid by insurance.
 - In the space provided on page two of this form please explain how income or assets are impacted.
 - Copy of parents' 2015 federal tax return transcript(s).
- Receipt of non-recurring income in 2015
 - In the space provided on page two of this form please explain the type and amount of income that was received in 2015 and will not be received in 2016. Explain purposes for which the income was used.
 - Add further explanation as to why that income could not have been saved and used for college.
- Change in marital status for student in 2016
 - It may be necessary for a student to change their marital status should he or she become married during the academic year. This would necessitate a change on the FAFSA. Form must be submitted by 10/15/2016.
 - Copy of Samford's verification worksheet.
 - Copy of the marriage license is required.
 - Copy of the student's and the spouse's 2015 federal tax return transcript.
- Transportation costs in excess of cost of attendance budget in 2016-2017 academic year.
 - Copies of records indicating major expenses related to commuting to Samford, excessive costs for students who live great distances from Samford, and/or major repairs while enrolled.
 - This adjustment is for increasing a student's cost of attendance budget, not to have the expense reduce income
- Purchase of computer for college use in 2016-2017 (limit of costs up to \$2,000) - **This is a one-time only adjustment.**
 - Receipt indicating total cost of one computer, amount paid, and the date of purchase. Additional software, hardware, and peripherals will not be considered and it must have been purchased in 2016.
 - This adjustment is for increasing a student's cost of attendance budget, not to reduce income reported on FAFSA.
- Childcare expenses in 2016-2017 academic year.
 - A statement from the childcare provider that detailing the amount charged and paid by the family.
 - This adjustment is for increasing the student's cost of attendance budget, not to have the expense reduce income. Furthermore, this adjustment is typically for adult students who are using financial aid to support their families while enrolled and does not apply towards traditional aged dependent students (18-23).

Part D. Procedures & Signatures

Any incomplete request forms will not be reviewed until all necessary documentation has been submitted. The review process may take as much as four weeks for processing. Please submit in a timely manner in order to avoid late fees or other penalties for delays in paying your bill. When your request has been received and deemed ready for review, you will receive a message through your Samford email account. Once the review is complete, you will receive an email through your Samford email account notifying you of the outcome.

By signing below, I have certified that the information provided on this form, and in corresponding documentation, is true and correct to the best of my knowledge. I understand this does not guarantee any changes in the original financial aid package offered, late fees accrued on any remaining account balance are my sole responsibility, and some aid may be adjusted should I be offered other sources of financial aid.

Student Signature _____ Date _____

*Parent Signature _____ Date _____

*Parent signature is required for dependent students