

# Belmont Abbey College

## 2023-2024 Special Circumstance Application

Student ID \_\_\_\_\_ Student Last Name \_\_\_\_\_ First Name \_\_\_\_\_ M.I. \_\_\_\_\_

Permanent Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

(\_\_\_\_\_) \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_  
Home Telephone Work Telephone

If the Special Circumstance Application indicates adjustments can be made, I authorize Belmont Abbey College to make these changes electronically on my behalf.

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_ Student Signature \_\_\_\_\_ Date \_\_\_\_\_  
(Required for Dependent Students)

**Instructions:** You have indicated that there are circumstances that may affect the results of your Free Application for Federal Student Aid (FAFSA). Please indicate the type of special circumstance that applies to you and your family and submit all the required documentation as listed below. Please upload the documents via Net Partner. You will be notified after your information is reviewed.

1. Unemployment / Loss of income from work \_\_\_ Student \_\_\_ Mother \_\_\_ Father \_\_\_ Spouse

Period of Unemployment: \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_.

\_\_\_ Layoff: Provide letter from employer or unemployment commission stating effective date

\_\_\_ Termination: Provide letter from employer or unemployment office stating effective date

\_\_\_ Other \_\_\_\_\_

### Other Documents Required:

- Statement from Employment Security Office of expected unemployment benefits
- Retirement pay statement (if applicable)
- Completed Estimated Income Table for 2023
- Copy of 2021 and 2022(when available) Federal Tax Transcripts and all W-2 forms or signed copy of tax returns and all W-2 forms – The tax transcripts may be requested from the IRS website: <https://www.irs.gov/individuals/get-transcript>
- Verification of earnings up to the date of last employment

2. Divorce / Separation \_\_\_ Student/Spouse \_\_\_ Parents

### Documents Required:

- A copy of the divorce decree, legal separation agreement, OR a letter from the attorney verifying the separation date
- 2021 and 2022 W-2 Forms, 2021 and 2022(when available) Federal Income Tax Transcripts or signed tax returns for student and both parents (if dependent student). Tax transcripts can be requested from the IRS website: <https://www.irs.gov/individuals/get-transcript>

- Completed Estimated Income Table for 2023 (Below)

3. Death of parent or spouse (after FAFSA was completed)

Relationship to student:        \_\_\_ Mother        \_\_\_ Father        \_\_\_ Spouse

**Documents Required:**

- A copy of the death certificate.
- 2021 and 2022 W-2 Forms, 2021 and 2022 (when available) Federal Income Tax Transcripts or a signed copy of 2021 and 2022 tax returns for student and both parents (if dependent student). Tax transcripts can be requested from the IRS website: <https://www.irs.gov/individuals/get-transcript>
- Statement of Death Benefits

4. Unusual Medical/Dental Expenses

**Documents Required:**

- 2021 and 2022 W-2 Forms, 2021 and 2022 (when available) Federal Tax Transcripts or a signed copy of 2021 and 2022 tax returns. Tax transcripts can be requested from the IRS website: <https://www.irs.gov/individuals/get-transcript>
- Statements from medical providers showing amounts paid by parents/student in 2022

5. Disability of parent, student, or spouse    \_\_\_ Student    \_\_\_ Mother    \_\_\_ Father    \_\_\_ Spouse

**Documents Required:**

- A letter from the Physician stating the date of the disability and documents supporting social security disability benefits received in 2023 (SSI)
- Completed Estimated Income Table for 2023

6. Loss of benefits and/or untaxed income

**Documents Required:** Documentation certifying loss of a benefit or untaxed income

\_\_\_\_\_ Social Security: Provide Social Security Administration Notification of Termination of Benefits

\_\_\_\_\_ Child Support: Provide court document stating termination of benefits

\_\_\_\_\_ Worker's Compensation: Provide a letter from Bureau of Worker's Compensation stating the termination date of benefits

\_\_\_\_\_ If child support and/or alimony, a copy of divorce decree to include settlement agreement

7. One-time income (examples: IRA distribution, back year Social Security payments, etc.)

**Documents Required:**

- Copy of 2021 and 2022 (when available) Federal Tax Transcripts or signed copy of tax returns and all W-2 forms - The tax transcripts can be requested from the IRS website: <https://www.irs.gov/individuals/get-transcript>
- Documentation of one-time income including amount, type of income, and date of receipt
- Statement of how funds were spent, invested, or rolled over

**INCOME FOR 2023 CALENDAR YEAR**

If you are divorced or separated, include only your income information. If your parents are divorced or separated, include only your custodial parent's income information. If your custodial parent has remarried include their spouse's information. If the loss of income is due to the death of your spouse/parent, include only your income information/surviving parent's income information. Make sure to include all income from 1/1/2023 – 12/31/2023.

Note: Write in Zero (0) if an item does not apply				
	<b>Father</b>	<b>Mother</b>	<b>Student</b>	<b>Spouse</b>
<b><u>Taxable</u></b>				
Wages, Salaries, Tips				
State Unemployment Benefits				
Pensions				
Alimony				
Death Benefits				
Other Taxable Income: Specify sources				
<b><u>Untaxable</u></b>				
Social Security Benefits				
Aid to Families with Dependent Children (AFDC)				
Child Support Received				
Other Untaxed Income Benefits				
<b>TOTAL Anticipated Income</b>				
Cash and Savings				