

**Special Circumstances Form
2008-2009 Academic Year
Union University Office of Student Financial Planning**

At some point in the financial aid process, you have indicated circumstances that you would like for us to review as we process your financial aid. Follow the steps below and return this form with the appropriate documentation to the address at the end of this form. The information you provide on this form will be reviewed to determine if adjustments to your FAFSA can be made. You will be notified of the decision by the Office of Student Financial Planning. All decisions made by the Office of Student Financial Planning concerning special circumstances are final. If you have questions, please contact the Office of Student Financial Planning at (731) 661-5015.

- File the 2008-2009 FAFSA. For quick results, file online at www.fafsa.ed.gov.
- Complete Section A of this form.
- In Section B, check all boxes which apply to your situation.
- Complete the Income Assessment Form in Section C.
- Student and Parent (if student is dependent) read the certification and sign in Section D.
- Attach a detailed letter documenting your circumstances to this Request Form.
- Attach documentation requested in Section B for the special circumstances you checked.
- Attach a signed copy of your and your parent's (if dependent) 2007 tax returns.
- **Complete and attach the Verification form found at <http://www.uu.edu/financialaid/>**
- Return this form with attachments to the Office of Student Financial Planning of Union University.

Section A – Student Information

NAME _____ SOCIAL SECURITY NUMBER _____

ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

PARENT(S) WHOSE INFORMATION WAS PROVIDED ON YOUR FAFSA:

MOTHER'S (STEPMOTHER'S) NAME _____

FATHER'S (STEPFATHER'S) NAME _____

TELEPHONE NUMBER WHERE YOU OR YOUR PARENT CAN BE REACHED IN THE EVENT OF QUESTIONS:

STUDENT PHONE NUMBER _____ PARENT PHONE NUMBER _____

LIST THE PEOPLE IN YOUR HOUSEHOLD, INCLUDING YOURSELF. LIST THE NAME OF THE COLLEGE FOR ANY MEMBER (EXCLUDING PARENTS) WHO WILL ATTEND COLLEGE AT LEAST HALF -TIME BETWEEN 7/1/07 AND 6/30/08

| Full Name | Age | Relationship | College |
|-----------|-----|--------------|------------------|
| | | Self | Union University |
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Section B – Special Circumstances

From the list provided, indicate the reason for the requested review of your family's financial situation.

Loss of a Job, or Parental Loss of Job

- Separation Notice/ Termination Notice or documentation from employer showing effective date of termination.
- Documentation of severance package (if one exists).
- Statement of Unemployment Benefits and effective dates.

Loss of Untaxed Income

- Loss of Social Security Benefits
 - Provide notification of termination of benefits.
- Loss of Child Support
 - Provide court documentation stating the date of termination of benefits.
- Loss of Worker's Compensation
 - Provide appropriate official documentation stating date of termination of benefits.
- Other. Please specify and provide appropriate documentation.

Loss of Taxable Income

- Loss of Alimony
 - Provide court documentation stating the date of termination of benefits.
- Loss of Unemployment Benefits
 - Provide appropriate letter from the unemployment office stating date of termination of benefits.
- Other. Please specify and provide appropriate documentation.

Excessive Medical Expenses

Payments made out of pocket beyond what your insurance covers. Do not include insurance premium costs.

- Provide bills showing the expenses.
- Provide proof of personal payment of the expenses in question (check stubs, receipts, etc)

Lump sum (one-time) income

This could include, but is not limited to inheritance, moving expense allowance, lump sum retirement payments, etc.

- Provide appropriate documentation identifying the income in question and how the funds were spent or invested.

Other Circumstances.

Please list _____

Section C – Income Assessment Form

Please complete the table below to help us assess your actual income for 2008. Report all income you expect to receive through December 31, 2008 in the appropriate boxes. You must include documentation supporting all income. This documentation could include but is not limited to:

- Recent pay stubs showing year-to-date earnings (since January 1, 2008)
- A letter from your employer stating total 2008 projected and or actual earnings
- W-2 Forms

If you are submitting the request for consideration after December 31, 2008, you must submit a copy of your completed 2008 federal income tax return.

PARENT INCOME AND ASSET INFORMATION (For Dependent students only)

| Income For 2008(January 1 To December 31) | Actual 1-1-08 To Today | Estimated Today To 12-31-08 | Total= Actual + Estimated |
|---|------------------------|-----------------------------|---------------------------|
| FATHER: expected income earned from work (wages, salaries, tips, net farm or business) | \$ | \$ | \$ |
| MOTHER: expected income earned from work (wages, salaries, tips, net farm or business) | \$ | \$ | \$ |
| Other Taxable income: (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains) SOURCE: | \$ | \$ | \$ |
| Social Security benefits | \$ | \$ | \$ |
| Child Support received | \$ | \$ | \$ |
| Other untaxed income: (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc) Source: | \$ | \$ | \$ |
| Total Parental Income for 2008 | \$ | \$ | \$ |

Please list your current asset information (if any of the following are applicable):

Net Worth means market value of the asset minus debt on the asset

- Current amount of cash, savings, and checking: \$ _____
- Current net worth of real estate/ investments (other than home): \$ _____
- Current net worth of farm or business: \$ _____

STUDENT INCOME AND ASSET INFORMATION

| Income For 2008 (January 1 To December 31) | Actual 1-1-08 To Today | Estimated Today To 12-31-08 | Total= Actual + Estimated |
|---|------------------------|-----------------------------|---------------------------|
| STUDENT: expected income earned from work (wages, salaries, tips, net farm or business) | \$ | \$ | \$ |
| SPOUSE: expected income earned from work (wages, salaries, tips, net farm or business) | \$ | \$ | \$ |
| Other Taxable income: (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains) SOURCE: | \$ | \$ | \$ |
| Social Security benefits | \$ | \$ | \$ |
| Child Support received | \$ | \$ | \$ |
| Other untaxed income: (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc) Source: | \$ | \$ | \$ |
| Total Student and/or Spouse Income for 2008 | \$ | \$ | \$ |

Section C Cont'd

Please list your current asset information (if any of the following are applicable):

Net Worth means market value of the asset minus debt on the asset

- Current amount of cash, savings, and checking: \$ _____
- Current net worth of real estate/ investments (other than home): \$ _____
- Current net worth of farm or business: \$ _____

Section D – Certification and Signature

My signature below certifies that the information I have provided on this form is true. I agree to provide proof of the information if and/or when requested. I understand that the penalty for providing false or misleading information is a \$10,000 fine, a prison sentence, or both.

PARENT SIGNATURE _____ DATE _____

STUDENT SIGNATURE _____ DATE _____

SPOUSE OF STUDENT SIGNATURE _____ DATE _____

FOR OFFICE USE ONLY

___ Student Not Eligible

___ Special Circumstances Adjustment Request Denied

Comments _____

___ Special Circumstances Adjustment Approved

FA ADMINISTRATOR _____

DATE _____

OFFICE OF STUDENT FINANCIAL PLANNING
 1050 UNION UNIVERSITY DRIVE
 JACKSON, TN 38305
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 EMAIL: finaid@uu.edu