



# Special Circumstance Form 2015-2016 Dependent Students

Federal Student Aid Regulations provide the potential for reevaluation if your financial circumstances change. The 2014 income information that you reported on your financial aid application may not be an accurate indicator of your ability to pay for educational costs. If your parents meet one of the circumstances indicated below, your financial aid eligibility may qualify for reevaluation. Once you have completed all steps below, return this form along with the **suggested supporting documentation** to the Trinity Student Financial Services Office. Submission of this form does not guarantee a change in your financial aid eligibility. Each case will be evaluated on an individual basis.

## Step I: Student Information

Name \_\_\_\_\_ Date \_\_\_\_\_  
Last First MI  
Permanent Address \_\_\_\_\_  
Number and Street (including Apt. No.) City State Zip Code  
Social Security Number \_\_\_\_\_ Phone \_\_\_\_\_

## Step II: Reason for Filing a Special Circumstance Form

Check (✓) the circumstance that applies to your situation. Documentation to support your parents' circumstance **must be attached**. To obtain a copy of your tax return transcript, please visit [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript).

- A. Your parent(s) earned money in 2014 but has since lost his/her full-time job and is still unemployed.

### Suggested Documentation:

- Statement from ALL previous employer(s) your parent worked for in 2014 and/or 2015 on company letterhead indicating:
  - Date your parent ceased employment
  - Total earnings for the ENTIRE year of 2014
  - Wages for 2015 (if employment ceased in 2015)
- A current statement of unemployment benefits received.
- Copy of your parents' 2014 W-2 form(s).
- Copy of your parents' 2014 federal 1040 tax return transcript.

- B. Your parent(s) earned money in 2014 but has changed employment and is currently earning substantially less money in 2015.

### Suggested Documentation:

- Statement on company letterhead from ALL employers your parent worked for in 2014 and/or 2015 indicating:
  - Dates of employment
  - Parent's estimated earnings for 2015
- 2014 W-2 form(s)
- Copy of your parents' 2014 federal 1040 tax return transcript.
- Recent check stub from current employer(s).

- C. Your parent(s) are now separated or divorced, but the 2015-2016 application for financial aid lists "Married" for the parent's tax filing status.

### Suggested Documentation:

- Copy of your parents' 2014 federal 1040 tax return transcript;
- Copy of both parents' 2014 W-2 form(s); and
  - If parents are separated:** Attach a signed statement indicating the dates of your parents' separation and list the address where each parent resides.
  - If parents are divorced:** Attach a copy of your parents' divorce decree.

- D. The financial aid application for 2015-2016 includes income earned by a parent who is now deceased.

### Suggested Documentation:

- Copy of your parent's death certificate;
- Copy of your parent's 2014 federal 1040 tax return transcript;
- Copy of both parent's 2014 W-2 form(s).

- E. Your parent(s) received unemployment compensation or some other taxed or untaxed income or benefit in 2014 but has completely lost that income or benefit. (\*Income and benefits include such things as: Social Security benefits, court-ordered child support, retirement or disability benefits. Don't include loss of veteran's educational benefits.)

### Suggested Documentation:

- Statement of termination from the source of income. Include dates he/she received the benefits.
- Statement from the source of the income or benefit indicating the dates your parent received the income benefit and the estimated income or benefit received in 2014.
- Copy of your parents' 2014 federal 1040 tax return transcript.

- F. Your parents received a one-time income in 2014, such as Social Security payment, inheritance, IRA, or pension distribution.

### Suggested Documentation:

- Copy of your parents' 2014 federal 1040 tax return transcript
- Statement from source of one-time income indicating amount
- Statement from your parents indicating the disposition of the funds.

- G. Your parents **paid out** (not owed) a large amount of medical and/or dental expenses in 2014.

Total Medical/Dental Expenses Paid in 2014 \$ \_\_\_\_\_

### Suggested Documentation:

- Copy of your parents' 2014 federal 1040 tax return transcript
- Copy of your parents' 2014 federal income tax Schedule A
- Copies of the medical and dental payments (receipts/statements) not covered by insurance that they have already paid.

- H. Your parents **paid** private or parochial elementary and/or secondary tuition in 2014.

Total Tuition Paid in 2014: \$ \_\_\_\_\_

### Suggested Documentation:

- Copies of paid receipts for private or parochial elementary and/or secondary tuition; or
- Statement from the education institution indicating tuition paid in 2014.
- Copy of your parents' 2014 federal 1040 tax return transcript

### Step III: Your Family's Expected Income in 2015

(Enter "0" or "N/A" where applicable. Note: If you checked items D, E, F, G, or H, skip Step III and complete Step IV.)

1. In 2015, how much will your father earn from work?	\$ _____
2. In 2015, how much will your mother earn from work?	\$ _____
3. In 2015, how much will your father receive in Unemployment Compensation?	\$ _____
4. In 2015, how much will your mother receive in Unemployment Compensation?	\$ _____
5. In 2015, how much will your parents receive in Child Support?	\$ _____
6. In 2015, how much will your father receive in Workers' Compensation?	\$ _____
7. In 2015, how much will your mother receive in Workers' Compensation?	\$ _____
8. In 2015, how much will your father receive in Social Security benefits?	\$ _____
9. In 2015, how much will your mother receive in Social Security benefits?	\$ _____
10. In 2015 how much will your parent(s) receive in other untaxed income, such as earned income credit, housing, food, and other living expenses from military, clergy, and others? (Include cash payments and cash value benefits.)	\$ _____

### Step IV: Read, Sign and Return to Trinity Student Financial Services Office

*Certification:* All the information on this form and the attached documents is true and correct to the best of my knowledge. If asked by an authorized official, I agree to give additional proof of the information that I have given on this form. I realize that this proof may include a copy of federal or state tax returns. I also realize that if I do not give proof when asked, the Special Circumstance will not be reviewed.

Student Signature \_\_\_\_\_ Parent Signature \_\_\_\_\_

Date Completed \_\_\_\_\_ *Is your documentation attached?*

The forms requested can be mailed, faxed, or sent by e-mail:

Trinity International University  
Student Financial Services  
2065 Half Day Road  
Deerfield, IL 60015

Fax: (847) 317-7081 Email: [finaid@tiu.edu](mailto:finaid@tiu.edu)

#### OFFICE USE ONLY

APPROVED  DENIED Date \_\_\_\_\_ Staff Signature \_\_\_\_\_  2<sup>nd</sup> Check By: \_\_\_\_\_

Reason for Denial \_\_\_\_\_

12 Month Period Used \_\_\_\_\_

Notes \_\_\_\_\_

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