

## 2021-2022 Change of Financial Situation - Independent Student

If your or your spouse's financial situation has changed from what was reported on the 2021-2022 Free Application for Federal Student Aid (FAFSA), use this form to request an evaluation of your financial aid eligibility. This form is meant to be a one-time form, not one that is completed every year, except in special circumstances. **This form should only be completed by independent undergraduate students who meet one of the reasons listed below in Section B.** As a general rule, the **anticipated 2021** Adjusted Gross Income (AGI) should be at least 20% less than the actual 2019 AGI before submitting documentation for reasons A, B, and C. **Submission of this form does not guarantee an adjustment to your financial aid.**

Please note, we reserve the right to correct information on the FAFSA, and to select students for verification if we have documents on file for other tax years. Please submit the specific tax year information listed on this form. **If you submitted the same tax information to our office in the prior academic year, you do not need to submit the documents again.**

### You must complete all of the following steps before this form will be reviewed:

STEP 1: Complete all pages of the Change of Financial Situation Form. Do not leave any items blank. If an item does not apply to you, enter a zero. This form is considered incomplete if an item is left blank.

STEP 2: Attach the 2021-2022 Independent Verification Form and all required verification documents.

STEP 3: Attach a copy of your signed 2019 IRS Federal Tax Return and IRS Schedules 1, 2, and 3.

STEP 4: Attach copies of all of your 2019 W-2 forms.

STEP 5: Attach a copy of your spouse's signed 2019 IRS Federal Tax Return and IRS Schedules 1, 2, and 3 (only if married).

STEP 6: Attach copies of all of your spouse's 2019 W-2 forms (only if married).

STEP 5: Attach copies of all of the requested documentation based on your change of financial situation (Section B).

Check this box if you are completing the Change of Financial Situation Form because you/your spouse (if married) have experienced financial hardship due to the COVID-19 pandemic.


### Section A - Demographic Information (Please Print Clearly)

Student Name: \_\_\_\_\_ Student Phone: \_\_\_\_\_

Student Email: \_\_\_\_\_

Student Address: \_\_\_\_\_  
Number and Street City State Zip Code

Spouse's Name (if applicable): \_\_\_\_\_

ENTER YOUR 9-DIGIT UIN 

2122

CFS-E

B

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Section B - Reasons for the Change of Financial Situation

Complete the items below by submitting ALL applicable documents listed under each reason.

A. Loss of job/reduction in income in 2020 or 2021: Student Spouse

- Attach a statement from your/your spouse's previous employer... Attach documentation of unemployment benefits... Attach a copy of your/your spouse's most recent pay statement... On a separate sheet of paper, document any other income you/your spouse will be receiving in 2021... Attach copies of monthly statements for any other income you/your spouse will be receiving in 2021.

B. Reduction in income in 2020 or 2021 due to a disability: Student Spouse

- List the date the disability occurred: Attach a letter from a physician or another source documenting the situation. Attach a copy of your/your spouse's most recent pay statement or last pay statement. On a separate sheet of paper, document any other income you/your spouse will be receiving in 2021... Attach copies of monthly statements for any other income you/your spouse will be receiving in 2021.

C. Loss of benefits or untaxed income in 2020 or 2021 (i.e., child support, disability benefits, etc.): Student Spouse

- Attach a statement from the appropriate agency showing the date the benefit was lost and the monthly amount received before the loss. Attach a copy of your/your spouse's most recent pay statement. On a separate sheet of paper, document any other income you/your spouse will be receiving in 2021... Attach copies of monthly statements for any other income you/your spouse will be receiving in 2021.

D. Divorce or separation AFTER completion of the 2021-2022 FAFSA:

- Date of separation or divorce: Attach separation papers/agreement or divorce decree/settlement. If no formal agreement is in place, attach proof of separate households (i.e., lease, mortgage bill, utility bill, etc.) for both student and spouse. Attach a copy of your most recent pay statement. On a separate sheet of paper, document any other income you will be receiving in 2021... Attach copies of monthly statements for any other income you will be receiving in 2021.

E. Death of spouse AFTER completion of the 2021-2022 FAFSA:

- Attach a copy of the death certificate. Attach a copy of your most recent pay statement. On a separate sheet of paper, document any other income you will be receiving in 2021... Attach copies of monthly statements for any other income you will be receiving in 2021.

F. Medical/dental expenses not paid by insurance and not claimed as a deduction on your 2019 Income Taxes (January 1, 2019 - December 31, 2019):

- As a general rule, these expenses should be at least 20% of your 2019 Adjusted Gross Income before submitting documentation. Attach proof of payment such as canceled checks or receipts for medical/dental expenses PAID in 2019. Attach a separate sheet of paper listing the total amount PAID in 2019.

ENTER YOUR UIN ->

Grid for entering UIN digits

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**G. Rollover incorrectly listed as untaxed income on your 2019 Income Taxes:**

- Attach a 1099-R Form or supporting documentation from the bank or brokerage firm, detailing the funds were a rollover.

**Section C - Anticipated Income for 2021 (complete for reasons A, B, C, D, and E)**

Report all anticipated taxable and nontaxable 2021 income (January 1, 2021 to December 31, 2021).

<b>Taxable Income</b>	<b>Student</b>	<b>Spouse</b>
Wages/salaries/tips/severance	\$	\$
Business income (self-employment)	\$	\$
Other taxable income (i.e., unemployment compensation, social security, taxable pension, taxable 401K, etc.)	\$	\$
Other taxable income (i.e., unemployment compensation, social security, taxable pension, taxable 401K, etc.)	\$	\$
Total Taxable Income	\$	\$
<b>Nontaxable Income</b>	<b>Student</b>	<b>Spouse</b>
Money received or paid on your behalf (i.e., in kind support) not reported elsewhere on this form. Source of money received:	\$	\$
Other nontaxable income (i.e., worker's compensation, disability income, untaxed pension, etc.)	\$	\$
Child Support Received	\$	\$
Total Nontaxable Income	\$	\$

**Check the boxes below to confirm you are submitting all required documentation:**

- Documentation requested on page 2 pertaining to my change of financial situation
- The 2021-2022 Independent Verification Form and all required verification documents
- A copy of your signed 2019 IRS Federal Tax Return and IRS Schedules 1, 2, and 3
- Copies of all of your 2019 W-2 forms
- A copy of your spouse's signed 2019 IRS Federal Tax Return and IRS Schedules 1, 2, and 3 (only if married)
- Copies of all of your spouse's 2019 W-2 forms (only if married)

**Section D - Statement of Certification**

I certify that the information provided on this form and any attachments are true and correct. Additionally, it is understood that I must notify Student Financial Aid and Scholarships if the situation outlined in this request changes. If I underestimate my anticipated income, I understand that I may be required to repay previously awarded financial aid. I may also have future Change of Financial Situation requests denied.

Student Signature

Date

ENTER YOUR UIN →

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