2022-2023 Change of Financial Situation Statement of Appeal

If the financial situation has changed for you, your parent(s), or your spouse (if independent per FAFSA) from what was reported on the 2022-2023 Free Application for Federal Student Aid (FAFSA), use this form to explain the change that has occurred. This form should only be completed by undergraduate students who are working on their first Bachelor's Degree. As a general rule, the anticipated 2022 Adjusted Gross Income (AGI) should be at least 20% less than the actual 2020 AGI before submitting this document for reasons related to loss of income and medical/dental expenses.

Once our office reviews the Change of Financial Situation Statement of Appeal, we will contact you for further information via email. No additional action is required on your part, until we contact you.

Allowable Reasons

1. Loss of job/reduction in income in 2021 or 2022
2. Reduction in income in 2021 or 2022 due to a disability
3. Loss of benefits or untaxed income in 2021 or 2022 (i.e., child support, disability benefits, COVID-19 unemployment, etc.)
4. Parents' divorce or separation AFTER completion of the 2022-2023 FAFSA
5. Your divorce or separation AFTER completion of the 2022-2023 FAFSA (if independent per FAFSA)
6. Parent's death AFTER completion of the 2022-2023 FAFSA
7. Spouse's death AFTER completion of the 2022-2023 FAFSA (if independent per FAFSA)
8. Medical/dental expenses not paid by insurance and not claimed as a deduction on your/your parent(s) 2020 IRS Federal Income Tax Return (January 1, 2020 - December 31, 2020)
9. Rollover incorrectly listed as untaxed income on your/your parent(s) 2020 IRS Federal Income Tax Return

☐ Check this box if you are submitting the Change of Financial Situation Statement of Appeal because of financial hardship due to the COVID-19 pandemic.

Section A - Demographic Information (Please Print Clearly)

Student Name:__________________________________________    Student Phone:___________________________

Student Email:__________________________________________

2223      CFSA−O      B
Section B - Appeal Information

Answer each question below.

1. Individual affected by change:

   - Student
   - Parent 1/Step-Parent 1 Name: ____________________________
   - Parent 2/Step-Parent 2 Name: ____________________________
   - Spouse (if Independent per FAFSA) Name: ____________________________

2. Explain in detail the allowable reason for submitting the Change of Financial Situation Statement of Appeal. Indicate if the circumstance occurred in 2021 or 2022 and if the circumstance has ended or is still occurring. Include the types of income affected, i.e., wages, business income, partnership/s-corporation income, unemployment, social security, worker’s compensation, etc.)

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Section C - Statement of Certification

I certify that the information provided on this form is true and correct.

Student Signature Date Parent Signature (Only for Dependent Students per FAFSA) Date

ENTER YOUR UIN

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