



2020/21 SPECIAL CIRCUMSTANCES REQUEST CONSIDERATION FORM

Financial aid eligibility for the 2020-2021 academic year is calculated based of the information you provided on the Free Application for Federal Student Aid (FAFSA). The income and asset information you submitted was evaluated by a formula called Federal Methodology as set by Congress. This formula assumes that 2018 income is a good predictor of the family's financial strength during the student's 2020-2021 award year. Based off this assumption, financial aid eligibility is determined using 2018 tax return information.

The Office of Financial Aid at Paul Smith's College recognizes that many families have changes in income or family situations that cannot be reflected in the 2018 tax return data. For this reason, it is possible for students to appeal their financial aid eligibility if they have unique financial circumstances.

An Income Override request may be filed if you have extenuating circumstances, which you believe warrant a reevaluation of your financial aid. Circumstances may include, but are not limited to:

- Loss or change of employment, including a separation from the military or retirement
- Loss or change in amount of child support, Social Security, or other benefits
- Divorce or separation of parents or spouse that occurs after the date the FAFSA was filed
- Death of parent(s) or spouse that occurs after the date the FAFSA was filed
- Unusual medical expenses (not covered by insurance) that make up more than 11 percent of your annual income
- One-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments)

Circumstances that are **NOT** considered extenuating include (but are not limited to) standard living expenses such as utilities and mortgage expenses, car payments, credit card, other personal debt, and all other discretionary expenses.

Please allow up to 2 weeks processing time from the time all documentation has been submitted. Submitted documentation will not be returned. Please do not submit originals. Notification of the decision by the Office of Financial Aid will be sent via email. All decisions made by the Office of Financial Aid concerning special circumstances are final. Please print, sign, and email all documents to Financialaid@paulsmiths.edu. Please contact us if you do not have the ability to print and sign.

Student Name:	Student ID#:
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I certify that the information associated with this form is true and correct to the best of my knowledge. I understand that I may be asked to submit additional documentation to verify the information I have provided. Failure to provide this information will result in this request not being processed.

Student Signature: _____ **Date:** _____

Parent Signature: _____ **Date:** _____

(Parent Signature is required only if student provided parental data on the FAFSA)

Respect and equity for the members of our community are top priorities for Paul Smith's College. PSC prohibits any form of discrimination in our admissions and employment processes. Please visit <https://www.paulsmiths.edu/title-ix-and-equity> to review our non-discrimination policies.

Check the box or boxes that apply to your situation and include ALL documentation listed next to each reason:

Reason	Documentation Required
<input type="checkbox"/> Loss or change of employment	<ul style="list-style-type: none"> ○ Verification Worksheet ○ Detailed letter explaining your circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ Letter from former employer(s) stating last date of employment ○ Copy of unemployment compensation letter or signed statement that you did not or will not receive unemployment benefits ○ Copy of last paystub(s) from former employer(s) and current employer(s), if applicable. ○ If this form is submitted after 1/1/2021, 2020 Tax Return Transcripts and W-2's must be submitted for student (spouse) and parents (if dependent) ○ Copy of DD214 and LES if request is due to discharge from active military duty
<input type="checkbox"/> Loss or change in amount of child support, Social Security, or other benefits	<ul style="list-style-type: none"> ○ Verification Worksheet ○ Detailed letter explaining circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ If benefit is terminated, provide documentation of monthly benefit amount and date of benefit termination ○ If benefits are reduced, provide documentation of original amount, date of reduction and reduced amount
<input type="checkbox"/> Divorce or separation of parents or spouse	<ul style="list-style-type: none"> ○ Verification Worksheet ○ Detailed letter explaining circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ Copy of separation documentation, proof of separate households, or divorce decree
<input type="checkbox"/> Death of parent(s) or spouse	<ul style="list-style-type: none"> ○ Verification Worksheet ○ Detailed letter explaining circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ Copy of death certificate
<input type="checkbox"/> Unusual medical expenses (not covered by insurance) that make up more than 11 percent of your income	<ul style="list-style-type: none"> ○ Verification Worksheet ○ Detailed letter explaining circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ Proof of payment not covered by insurance
<input type="checkbox"/> One-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments)	<ul style="list-style-type: none"> ○ Verification Worksheet ○ Detailed letter explaining circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ Documentation to identify the source of income ○ Proof of payment and itemized statement showing how the funds were spent
<input type="checkbox"/> Student's parent has retired	<ul style="list-style-type: none"> ○ Dependent Verification Worksheet ○ Detailed letter explaining circumstances ○ 2019 Tax Return Transcript for student and parents (if dependent) ○ 2019 W-2's for student and parents (if dependent) ○ Documentation of monthly income sources for all retirement income, including social security (if applicable)