



Financial Aid Office • 650 W. Easterday Ave • Sault Ste. Marie, Michigan 49783  
906-635-2678 • Fax: 906-635-6669

## **Re-evaluation Request** **Change in the Family's Financial Status**

**2010-2011**

When you filed your Free Application for Federal Student Aid (FAFSA) for 2010-11, you reported actual income information from 2009. If your family circumstances have substantially changed since January of 2009, reducing your ability to contribute to your educational expenses, you can request a review of your special circumstances. You will need to provide collaborating evidence of the change and complete the "anticipated" 2010 income for the person(s) who experienced the income reduction. If you are reporting a wage loss, please wait until you can reasonably anticipate the new 2010 income, including unemployment and/or severance pay.

Students are awarded initially based on 2009 information from the FAFSA. A re-evaluation is not an assurance that you will qualify for need-based aid, or if already eligible, will qualify for additional aid. Using professional judgment to adjust your FAFSA information is done on a case-by-case basis. Furthermore, except for the Federal Pell Grant, any new award is contingent on the availability of funds at the time the re-evaluation is made.

Some reasons include:

- (a) Unemployment or retirement of a student or spouse
- (b) Death or disability
- (c) Separation and Divorce
- (d) Loss of untaxed income or child support
- (e) Unusual medical expenses (in excess of 11% of AGI)

If your family circumstances fall within one or more of these criteria, please follow these instructions:

- 1. COMPLETE THE SPECIAL CIRCUMSTANCES FORM.**
- 2. FURNISH THIS OFFICE WITH SUPPORTIVE DATA FROM THE APPROPRIATE PERSON(S) OR AGENCY(IES) ON THEIR LETTERHEAD STATIONARY.**

For example:

Disability of a wage earner should be supported by a letter from a doctor indicating date of disability, and any other information pertinent to the disability. Also, a statement from each source of income indicating the amount provided per week or month and the duration of support.

Supportive data may involve a statement from a doctor, a lawyer, or employer, Government Unemployment Office, Social Security Office, Death Certificate or any other pertinent documentation.

- 3. IF YOU HAVE NOT ALREADY DONE SO, INCLUDE A SIGNED COPY OF YOUR 2009 FEDERAL INCOME TAX FORMS AND VERIFICATION OF UNTAXED INCOME.**

If you have any questions concerning this form, its completion and/or the supportive data required, please contact the LSSU Financial Aid Office at 1-888-800-LSSU or (906) 635-2678.

**INDEPENDENT**

**Special Circumstance Form**

Print Student's Name

Student I.D. Number

If your family's income has been reduced for one of the reasons given below, you should complete this form and return it to the **Lake Superior State University, Financial Aid Office, 650 West Easterday Ave., Sault Ste. Marie, MI, 49783**, for further consideration of your 2010-2011 financial aid. If you are unable to estimate the total income your family will receive from **January 1, 2010 until December 31, 2010**, at this time, keep this form until you can provide an accurate estimate.

1. Please review the sections below and indicate which explanation(s) applies to the reason(s) your family's 2010 income will be reduced.

Death of Spouse (death must have occurred **on or after** January 1, 2009). **Submit Death Certificate.**

Date:       /      /        
**Month / Day / Year**

Permanent and total disability of spouse or applicant (must have occurred on or after January 1, 2009).

Date:       /      /        
**Month / Day / Year**

Spouse has retired; been unemployed or under-employed for at least two full months or will experience a change in employment status due to enrollment in a post secondary institution.

**MUST HAVE DOCUMENTATION FROM EMPLOYER such as termination letter, lay off notice, final paystub, new paystub from current job, unemployment benefits notice, etc.**

Date:       /      /        
**Month / Day / Year**

Student has retired; been unemployed or under-employed for at least two full months or will experience a change in employment status due to enrollment in a post secondary institution.

**MUST HAVE DOCUMENTATION FROM EMPLOYER such as termination letter, lay off notice, final paystub, new paystub from current job, unemployment benefits notice, etc.**

Date:       /      /        
**Month / Day / Year**

Student has become separated or divorced since January 1, 2010. **MUST SUBMIT DIVORCE DECREE.**

Date:       /      /        
**Month / Day / Year**

Untaxed income has ceased or been reduced. Source of untaxed income \_\_\_\_\_.

Date:       /      /        
**Month / Day / Year**

Unusual medical expenses in excess of 11% of adjusted gross income. Must include receipt total of all bills paid of 2009, per IRS definition of allowable medical expenses.

2. You must provide an explanation detailing all reasons your family's 2010 income will be reduced and complete the rest of the form. (attach a separate sheet of explanation if needed)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. **Include** third party documents to support your request; e.g. Death Certificate, termination letter, Complaint for Divorce or Divorce Judgment. **This request must be submitted WITH THIRD PARTY DOCUMENTATION.** When you report income earned to date for 2010, include copies of your most recent pay stubs or unemployment benefits as verification of your amounts earned. Remember, if reporting an income change, your 2009 W2s and Federal Tax Forms are needed.

