

Please complete form in blue or black ink. Incomplete forms will not be accepted.

Since you filed your Free Application for Federal Student Aid (FAFSA) for 2020-2021 as a dependent student under the age of 24, you have now married. You are requesting a change from dependent to independent student for the 2020-21 year.

Complete this form and submit the required documents listed:

**COMPLETE THE SPECIAL CIRCUMSTANCES FORM AND ALL DOCUMENTS REQUESTED BELOW:**

1. Attach a copy of your MARRIAGE LICENSE.
2. If your name has changed, submit a copy of your new SOCIAL SECURITY CARD and update your name with the Registrar's Office..
3. Complete an 2020-21 INDEPENDENT VERIFICATION WORKSHEET (V2) with your spouse, sign and submit with this form.
4. Submit a copy of YOU AND YOUR SPOUSE'S INDIVIDUAL 2018 FEDERAL INCOME TAX RETURNS.
5. If either of you worked in 2018 but did not file taxes, submit a copy of your W2s from each employer.
6. Sign and submit a 2020-21 STATEMENT OF EXPENSE & HOUSEHOLD RESOURCES (V7).
7. Submit a copy of the 2020-21 ASSET VERIFICATION FORM (V3) for you and your spouse.

**Complete both** the student **AND** the spouse's income for 2020 (Gross Taxed and Untaxed) below with income prior to exemptions, adjustments, or deductions; you expect to receive from **January 1, 2020 until December 31, 2020**.

|  | IF NONE, ENTER "0".               |   |
|--|-----------------------------------|---|
| TOTAL 2020 Estimated Gross Taxable Income  | Student's Anticipated Income 2020 | A<br>N<br>D<br>Spouse's Anticipated Income 2020 |
| 1. Wages, salaries, tips (received to date in 2020)<br><b>PLUS</b> anticipated Wages for the remainder of 2020 | \$ Rec'd '20<br>+<br>\$ Expected  | \$ Rec'd '20<br>+<br>\$ Expected                |
| 2. Severance pay   | \$                                | \$  |
| 3. Pensions and annuities for 2020   | \$                                | \$  |
| 4. Interest and dividend income anticipated for 2020   | \$                                | \$  |
| 5. Business or farm income anticipated for 2020  | \$                                | \$  |
| 6. Capital gains anticipated for 2020  | \$                                | \$  |
| 7. Income received from rents after expenses paid for mortgage interest, taxes, and insurance                  | \$                                | \$  |
| 8. Alimony which will be received in 2020  | \$                                | \$  |
| 9. Unemployment Compensation (State and/or SUB) Received to date & anticipated for remainder of 2020           | \$                                | \$  |
| 10. Any other taxed income, including Social Security  | \$                                | \$  |
| <b>Total Estimated 2020 Gross Taxable Income</b>   | <b>\$</b>                         | <b>\$</b>                                       |

| TOTAL 2020 Estimated Untaxed Income   | Student's<br>Anticipated Untax.<br>Income 2020 | O<br>R | Spouse's<br>Anticipated Untax.<br>Income 2020 |
|---|--|--------|---|
| 1. Payments to tax-deferred pension & savings plans (paid directly or withheld from earnings). Include untaxed portion of 401(k) and 403(b) plan-W2 Box 12                  | \$   |        | \$  |
| 2. Retirement or disability benefits anticipated for 2020   | \$   |        | \$  |
| 3. Workers' Compensation to be received in 2020   | \$   |        | \$  |
| 4. Welfare benefits including AFDC or ADC (excluding food stamps)   | \$   |        | \$  |
| 5. Untaxed portion of pensions  | \$   |        | \$  |
| 6. Living & housing allowances (excluding rent subsidies for low-income housing) for clergy, tribal, military, and others (include cash payments or cash value of benefits) | \$   |        | \$  |
| 7. Child support or maintenance payments which will be received for ALL children. (Include cash support or money paid by the non-custodial parent)                          | \$   |        | \$  |
| 8. Veterans benefits, except student's educational benefits. Include VA disability, death pension & DIC.  |  |        |   |
| 9. Railroad Retirement benefits or Tribal benefits  |  |        |   |
| 10. Any other untaxed income and benefits for 2020  | \$   |        | \$  |
| <b>Total 2019 Untaxed Income</b>  | <b>\$</b>                                      |        | <b>\$</b>                                     |

REMINDER: If you are requesting an income adjustment, a 2020-21 Verification Worksheet for Independent Students and a copy of your 2018 Federal Income Tax Form or Tax Return Transcript must be on file before your special circumstance request can be reviewed.

**The penalty for submission of fraudulent information on this form may be repayment of TRIPLE any amount of money received plus a fine and/or imprisonment.**

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (if married)

\_\_\_\_\_  
Date

**OFFICE USE ONLY**

\_\_\_\_\_  
Director's Signature

**Approve**  
 **Disapprove**  
Date

Internal use ONLY

Reviewed: \_\_\_\_\_

Scanned: \_\_\_\_\_

**PJ-MAR-SC3**

**RETURN FORMS TO:**

Lake Superior State University  
Financial Aid Office  
650 West Easterday Avenue  
Sault Ste. Marie, MI 49783  
Phone: 906-635-2678  
Fax: 906-635-6669  
Email: [finaid@lssu.edu](mailto:finaid@lssu.edu)