

Student's Last Name, First, M.I.

CofC ID number

Email Address

After completing the FAFSA, you may submit this form to document student special circumstances. To begin, select one or more of the special circumstances below. Please provide all required documentation. Providing inadequate documentation will result in delayed processing or rejection of this request. Please note that submitting this request does not guarantee that a student will receive increased financial aid.

Check the box below that applies to your situation. You must attach a detailed personal letter in addition to the required documentation below.

You or your spouse earned money in 2024 but lost job and is still unemployed. **Required documentation*:**

1. Statement from previous employer that includes your last date of employment; and
2. A current statement of unemployment benefits or severance package received, if applicable; and
3. Final pay stub(s) you and your spouse
4. Complete the Estimated Year Income Statement on page 2 and attach 2024 federal tax documents.

* In some cases, we may require a future federal tax return before we make any adjustments.

You or your spouse earned money in 2024 but had a loss of income and earned substantially less money in 2025 or 2026. **Required documentation*:**

1. A copy of your or your spouse' 2024 IRS Tax Return Transcript and/or 2024 IRS 1040 Tax Return with schedules and W2s
2. Final pay stub(s) from previous employer and last pay stub from current employer, if applicable
3. Detail letter indicating dates, employers, severance, unemployment compensation, and other untaxed income.
4. Complete Estimated Year Income Statement on page 2 for student and spouse.

* In some cases, we may require a future federal tax return before we make any adjustments.

Since completing the 2026-2027 FAFSA, Your or your spouse have separated or divorced. **Required Documentation:**

1. If you separated after FAFSA filed, attach a statement indicating the date of your separation and proof of separate domicile. Attach a copy of the separation agreement if applicable.
2. If you are divorced: Attach a copy of your divorce decree.
3. Attach signed and dated copy of 2024 federal 1040 federal tax return, schedules and W2(s)

Since completing the 2026-2027 FAFSA, a supporting your spouse has died. **Required Documentation:**

1. A copy of your spouse death certificate or obituary
2. A signed and dated copy of the 2024 federal tax return, schedules and W2(s)

You or your spouse received a one-time income in 2024, loss, or reduction in benefit (e.g., taxable Social Security payment, inheritance, child support received, IRA or pension distribution). **Required Documentation:**

1. A statement from source of one-time income indicating amount; and
2. A statement from student and/or spouse indicating the disposition of the funds.
3. Documentation of benefit loss or reduction (divorce decree, Social Security Notice, federal tax return, 1099)

Your or your spouse paid out at least \$3000 of medical and/or dental expenses in 2024. Total medical and/or dental expenses PAID from January 2024 through December 2024: \$ **Required Documentation:**

1. Copies of medical and/or dental receipts showing medical payments paid out of pocket in 2023 not covered by insurance.
2. Signed federal tax return and/or Tax Return Transcript including schedule "A" if claimed on federal return.

STUDENT/SPOUSE ESTIMATED YEAR INCOME STATEMENT

- 1) Date employment ceased (if applicable) _____
- 2) Income earned by Student from January 1, 2026, to December 31, 2026 _____
- 3) Income earned by Spouse from January 1, 2026, to December 31, 2026 _____
- 4) Student taxable income (**other than earned wages**) expected from 01/01/26 to 12/31/26 (including unemployment, interest income, severance, pensions etc.) _____
- 5) Spouse taxable income (**other than wages earned**) expected from 01/01/26 to 12/31/26 (including unemployment, interest income, severance, pensions etc.) _____
- 6) Student/Spouse untaxed income from 01/01/26 to 12/31/26 from the following source
 - a) Deductible IRA and/or Keogh payments _____
 - b) Untaxed portions of pensions, IRA distributions _____
 - c) Annual Child Support received _____
 - d) Pension rollover or IRA Rollover into another qualified plan _____
 - e) Other untaxed income and benefits (explain and provide expected amounts, such as worker's compensation) _____
 - f) Foreign Income Exclusions _____

Update Totals: Cash/Checking/Savings _____ Investments _____

Business Value _____ Number of people in household _____

I certify that the information listed above is a complete and accurate breakdown of all expected income, taxed and untaxed, for the calendar year 2026. I further certify that if any information of the above information changes, I will notify the Financial Aid Office in writing of the changes.

Student Signature _____ Date _____

Office Use Only Approved SAI: Old: _____ New: _____

Denied Reason _____

Staff signature _____ Date: _____