TRINITY
INTERNATIONAL UNIVERSITY
2065 Half Day Road • Deerfield, IL 60015

Special Circumstance Form 2014-2015
Dependent

Federal Student Aid Regulations provide the potential for reevaluation if your financial circumstances change. The 2013 income information that you reported on your financial aid application may not be an accurate indicator of your ability to pay for educational costs. Your parents must meet one of those circumstances indicated below to qualify for reevaluation of your financial aid eligibility.

Once you have completed all steps below, return this form along with the **required supporting documentation** to the Trinity International University Financial Aid Office. Submission of this form does not guarantee a change in your financial aid eligibility. Each case will be evaluated on an individual basis.

Step I: Student Information

Name _____ Date _____
Last First MI

Permanent Address _____
Number and Street (including Apt. No.) City State Zip Code

Social Security Number _____ Phone _____

Step II: Reason for Filing a Special Circumstance Form

Check (√) the circumstance that applies to your situation. Required documentation to support your parents' circumstance ***must be attached.*** **To obtain a copy of your tax return transcript, call the IRS at 1-800-829-1040 or www.irs.gov.**

☐ A. Your parent(s) earned money in 2013 but has lost his/her full-time job in the last ten (10) weeks and is still unemployed.

Required Documentation:
1. Statement from ALL previous employer(s) your parent worked for in 2013 and/or 2014 on company letterhead indicating:
- Date your parent ceased employment
- Total earnings for the ENTIRE year of 2013
- Wages for 2014 (if employment ceased in 2014)

2. A current statement of unemployment benefits received.
3. Copy of your parents' 2013 W-2 form(s).
4. Copy of your parents' 2013 federal 1040 tax return transcript.

☐B. Your parent(s) earned money in 2013 but has changed employment and is currently earning substantially less money in 2014.

Required Documentation:
1. Statement on company letterhead from ALL employers your parent worked for in 2013 and/or 2014 indicating:
- Dates of employment
- Parent's estimated earnings for 2014

2. 2013 W-2 form(s)
3. Copy of your parents' 2013 federal 1040 tax return transcript.

☐C. Your parent(s) received unemployment compensation or some other taxed or untaxed income or benefit for at least ten (10) weeks in 2013 but has completely lost that income or benefit.

Required Documentation:
1. Statement of termination from the source of income. Include dates he/she received the benefits.
*NOTE: Income and benefits include such things as: Social Security benefits, court-ordered child support, retirement or disability benefits. Don't include loss of veteran's educational benefits.
2. A statement from the course of the income or benefit indicating the dates your parent received the income benefit and the estimated income or benefit received in 2013.
3. Copy of your parents' 2013 federal 1040 tax return transcript.

☐D. Since you applied for financial aid for 2014-2015, your parents have separated or divorced.

Required Documentation:
1. Copy of your parents' 2013 federal 1040 tax return transcript;
2. Copy of both parents' 2013 W-2 form(s); and
- **If parents are separated:** Attach a notarized statement indicating the dates of your parents' separation.
- **If parents are divorced:** Attach a copy of your parents' divorce decree.

☐E. Since you applied for financial aid for 2014-2015, a supporting parent has died.

Required Documentation:
1. Copy of your parent's death certificate;
2. Copy of your parent's 2013 federal 1040 tax return transcript;
3. Copy of both parent's 2013 W-2 form(s).

☐F. Your parents received a one-time income in 2013, such as Social Security payment, inheritance, IRA, or pension distribution.

Required Documentation:
1. Copy of your parents' 2013 federal 1040 tax return transcript
2. Statement from source of one-time income indicating amount
3. Statement from your parents indicating the disposition of the funds.

☐G. Your parents paid out (not owed) a large amount of medical and/or dental expenses in 2013.

Total Medical and Dental Expenses Paid in 2013

$_____

Required Documentation:

1. Copy of your parents' 2013 federal 1040 tax return transcript
2. Copy of your parents' 2013 federal income tax Schedule A
3. Copies of the medical and dental payments (receipts/statements) not covered by insurance that they have already paid.

☐H. Your parents paid private or parochial elementary and/or secondary tuition in 2013.

Total Tuition Paid in 2013: $_____

Required Documentation:

1. Copies of paid receipts for private or parochial elementary and/or secondary tuition; or
2. A statement from the education institution indicating tuition paid in 2013.
3. Copy of your parents' 2013 federal 1040 tax return transcript

Step III: Your Family's Expected Income in 2014

(Note: If you checked items D, E, F, G, or H, skip Step III and complete Step IV.)

1. In 2014, how much will your father earn from work? $_____
2. In 2014, how much will your mother earn from work? $_____
3. In 2014, what will be the amount of your parents' tax deductible IRA and/or Keough? $_____
4. In 2014, how much will your father receive in Unemployment Compensation? $_____
5. In 2014, how much will your mother receive in Unemployment Compensation? $_____
6. In 2014, how much will your parents receive in Child Support? $_____
7. In 2014, how much will your father receive in Workers' Compensation? $_____
8. In 2014, how much will your mother receive in Workers' Compensation? $_____
9. In 2014, how much will your father receive in Social Security benefits? $_____
10. In 2014, how much will your mother receive in Social Security benefits? $_____
11. In 2014 how much will your parent(s) receive in other untaxed income, such as earned income credit, housing, food, and other living expenses from military, clergy, and others? (Include cash payments and cash value benefits.) $_____

Step IV: Read, Sign and Return to Trinity Financial Aid Office

Certification: All the information on this form and the attached documents is true and correct to the best of my knowledge. If asked by an authorized official, I agree to give additional proof of the information that I have given on this form. I realize that this proof may include a copy of federal or state tax returns. I also realize that if I do not give proof when asked, the Special Circumstance will not be reviewed.

Student Signature_____ Parent Signature_____

Date Completed_____ ***Is your required documentation attached?***

The forms requested can be mailed, faxed (847-317-7081), or sent by e-mail (finaid@tiu.edu).

OFFICE USE ONLY

☐ APPROVED ☐ DENIED Date_____ Staff Signature _____ ☐ 2nd Check By:_____

Reason for Denial_____