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

Special Circumstance Form 2014-2015
Independent

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. You (or your spouse) 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 you or your spouse's 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. You (or your spouse) earned money in 2013 but have lost your full-time job in the last ten (10) weeks and are still unemployed.

Required Documentation:

1. Statement from ALL previous employer(s) you (or your spouse) worked for in 2013 and/or 2014 on company letterhead indicating:
   - Date you (or your spouse) 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 (and your spouse's) 2013 W-2 form(s).
4. Copy of your (and your spouse's) 2013 federal 1040 tax return transcript

☐B. You (or your spouse) earned money in 2013 but have changed employment and are currently earning substantially less money in 2014.

Required Documentation:

1. Statement on company letterhead from ALL employers you (or your spouse) worked for in 2013 and/or 2014 indicating:
   - Dates of employment
   - Your (or your spouse's) estimated earnings for 2014;
2. Your (or your spouse's) 2013 W-2 form(s)
3. Copy of your (and your spouse's) 2013 federal 1040 tax return transcript

☐C. You (or your spouse) received unemployment compensation or some other taxed or untaxed income or benefit for at least ten (10) weeks in 2013 but have 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 source of the income or benefit indicating the dates he/she received the income benefit and the estimated income or benefit received in 2013.
3. Copy of your (and your spouse's) 2013 federal 1040 tax return transcript

☐D. After you applied for financial aid for 2014-2015, you and your spouse have separated or divorced.

Required Documentation:

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

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

Required Documentation:

1. Copy of your spouse's death certificate;
2. Copy of your 2013 federal 1040 tax return transcript; and
3. Copy of your 2013 W-2 form(s).

☐F. You (or your spouse) received a one-time income supplement in 2013, such as Social Security payment, inheritance, IRA, or pension distribution.

Required Documentation:

1. Copy of your (and your spouse's) 2013 federal 1040 tax return transcript;
2. Statement from source of one-time income indicating amount; and
3. Statement from you indicating the disposition of the funds.

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

Total unreimbursed Medical and Dental Expenses Paid in 2013

$_____

Required Documentation:

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

☐H. You 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 (and your spouse's) 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 you earn from work? $_____
2. In 2014, how much will your spouse earn from work? $_____
3. In 2014, what will be the amount of your tax deductible IRA and/or Keough? $_____
4. In 2014, how much will you receive in Unemployment Compensation? $_____
5. In 2014, how much will your spouse receive in Unemployment Compensation? $_____
6. In 2014, how much will you and your spouse receive in Child Support? $_____
7. In 2014, how much will you receive in Workers' Compensation? $_____
8. In 2014, how much will your spouse receive in Workers' Compensation? $_____
9. In 2014, how much will you receive in Social Security benefits? $_____
10. In 2014, how much will your spouse receive in Social Security benefits? $_____
11. In 2014, how much will your and your spouse 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 provide 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_____ Spouse Signature_____

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

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

OFFICE USE ONLY

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

Reason for Denial_____