

Union College Financial Aid Office
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COLLEGE

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2018-2019 CHANGE IN FAMILY CIRCUMSTANCES FORM

LAST _____ FIRST _____ MIDDLE INITIAL _____ UNION ID _____

This form is used by families who have experienced a change in financial circumstances **after the 2016 tax year**. Our office will use all provided information to evaluate your need for additional financial assistance based on your special circumstances. Qualifying factors might include an unusual expense, a loss of income, or a divorce. Situations we will NOT consider: the inability to liquidate assets, consumer indebtedness, mortgage payments, property taxes, or home repairs. Please be as specific as possible when providing dollar amounts. **We will not review forms that are incomplete or that are not accompanied by supporting documentation.**

Change in Circumstance

Please select the box that best describes your situation.

Loss of Income From Work

- A parent/stepparent who earned money in 2016 lost his/her job and was unemployed during 2017
- A parent/stepparent who earned money in 2016 lost his/her job and has been unemployed for at least 9 weeks in 2018
- A parent/stepparent has experienced a loss of income due to disability
- A parent/stepparent is now earning a significantly reduced rate of pay

Required Supporting Documentation:

- 2017 IRS Tax Return Transcripts and all corresponding W-2 forms
- Letter from previous employer verifying loss of employment and date of termination
- For those who experienced this change during 2018, send your most recent pay stub
- Documentation of any benefits you are receiving (eg., Worker's Compensation, Unemployment, Disability, etc.) and time period you will be receiving the benefit

The chart below must be completed with estimated income amounts or we will be unable to evaluate your need for additional assistance. The line numbers listed correspond to the IRS 1040 Federal Tax Return. Please have your last completed tax return available for reference purposes.

ESTIMATED TAXABLE INCOME	2018 ESTIMATE
Father/stepfather's taxable wages (Line 7)	
Mother/stepmother's taxable wages (Line 7)	
Rental/business/capital losses (Lines 12+13+17 -If negative amount, use minus sign)	
IRA distribution, pension distribution, social security benefits (Lines 15b, 16b & 20b)	
Unemployment compensation (Line 19)	
Other (List source: _____)	
Total Income (Line 22)	
Less IRA, self-employed SEP/SIMPLE plans and health savings deduction (Lines 25,28 & 32)	
Less any other adjustments to income (Lines 23-35, excluding 25, 28 & 32)	
Adjusted Gross Income (Line 37)	

ESTIMATED UNTAXED INCOME	2018 ESTIMATE
Tax-Deferred Pension (On W-2: Box 12A-12D, codes D, E, F, G, H, J, or S)	
Tax-Exempt Interest (Line 8b)	
Worker's Compensation	
Child Support Received	
Social Security Benefits for all household members(Subtract line 20b from line 20a)	
IRA/Pension (Subtract line 15b from line 15a and/or subtract line 16b from line 16a)	
Other (list source: _____)	

2018-2019 CHANGE IN FAMILY CIRCUMSTANCES FORM(Page 2)

LAST

FIRST

MIDDLE INITIAL

UNION ID

Loss of Child Support

•A parent/stepparent received child support in 2016 and has had, or will experience, a complete loss of this support in 2017 or 2018

Original monthly amount of child support for all children: _____ Date of change: ____ / ____ / ____

New monthly amount for all children (enter "zero", when applicable): _____

Required Supporting Documentation:

•Verification of court-ordered child support and date that support will cease (e.g., separation/divorce decree)

Separation or Divorce after 2016 tax year

Date of separation or divorce: ____ / ____ / ____

Required Supporting Documentation:

- Legal separation papers, verification letter from attorney, or divorce decree
- Documentation of any child support/alimony to be received per month
- 2017 IRS Tax Return Transcripts and corresponding W-2 Forms from both the custodial and non-custodial parent

Important Notes:

- Our office must receive a completed form **from each parent** with estimates of 2018 income using the chart on Page 1.
- If either the custodial or non-custodial parent is remarried**, new spousal income must be included in the 2018 estimates. Further, If the remarriage occurred during the 2017 tax year, you must submit that spouse's 2017 IRS Tax Return Transcripts and corresponding W-2 forms even if you did not, nor were required to, file with him/her.

Death of a Wage Earner after 2016 tax year

Date of Death: ____ / ____ / ____

Required Supporting Documentation:

- 2017 IRS Tax Return Transcripts and all corresponding W-2 Forms
- Verification of benefits that will be received as a result of wage earner's death
- Death certificate
- Chart on page 1 of this form must be completed with 2018 estimated income information**

Other Circumstance not listed

Please list your situation below and contact the financial aid office for required documentation

Certification

By signing this form, I certify that all of the information reported to qualify for Federal and Institutional Financial Aid is complete and correct to the best of my knowledge.

STUDENT SIGNATURE

DATE

PARENT SIGNATURE

DATE