

2019-20 Form Change in Family Circumstances Form

LAST

FIRST

M.I.

UNION ID

This form is used by families who have experienced a change in financial circumstances after the 2017 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 2017 lost his/her job and was unemployed during 2018
- A parent/stepparent who earned money in 2017 lost his/her job and has been unemployed for at least 9 weeks in 2019
- 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:

- Complete chart on page 2 of this form
- 2018 IRS Tax Return Transcripts with all schedules and corresponding W-2/1099 Forms
- Letter from previous employer verifying loss of employment and date of termination
- For those who experienced this change during 2019, send your most recent pay stub
- Documentation of any benefits you are currently receiving (e.g., Workers' Compensation, Unemployment, Disability, etc.) and time period you will be receiving the benefit

Loss of child support

- A parent/stepparent received child support in 2017 and has had, or will experience, a complete loss of this support in 2018 or 2019

Original monthly amount of support for **all** children: _____ Date of change: _____

New monthly amount for all children (enter "0", 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 2017 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, or paid, per month
- 2018 IRS Tax Return Transcripts with all schedules and W-2/1099 Forms from both the custodial and non-custodial parent

Important Notes:

- Our office must receive a completed form **from each parent** with estimates of 2019 income using chart on Page 2
- **If either the custodial or non-custodial parent is remarried**, new spousal income must be included in 2019 estimates. Further, if the remarriage occurred during the 2018 tax year, you must submit that spouse's 2018 IRS Tax Return Transcripts with all schedules and corresponding W-2 Forms even if you did not, nor were required to, file with him/her

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Death of a wage earner after 2017 tax year

Date of Death: _____

Required Supporting Documentation:

- 2018 IRS Tax Return Transcripts with all schedules and corresponding W-2/1099 Forms
- Verification of benefits that will be received as a result of wage earner's death
- Death certification
- Complete chart below using estimated 2019 income information

Other circumstance not listed

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

The table below must be completed with estimated income amounts or we will be unable to evaluate your need for additional assistance. Please have your last completed tax return available for reference purposes.

| Estimated Taxable Income – All line numbers correspond to IRS Form 1040 | 2019 Estimate |
|---|---------------|
| Father/stepfather's taxable wages (line 1) | |
| Mother/stepmother's taxable wages (line 1) | |
| Rental/business/capital losses (Schedule 1 lines 12+18, Schedule K-1 form 1065, Box 14 Code A). If negative, use minus sign | |
| IRA distribution, pension distribution, SS benefits (lines 4a & 5a) | |
| Unemployment Compensation (Schedule 1 line 19) | |
| Other. List source: | |
| Total Income (line 22) | |
| Less IRA, self-employed SEP/SIMPLE plans and Health Savings deductions (Schedule 1 lines 25, 28 & 32) | |
| Less any other adjustments to income (Schedule 1 lines 23-35, excluding 25,28 & 32) | |
| Adjusted Gross Income (line 7) | |

| Estimated Untaxed Income | 2019 Estimate |
|--|---------------|
| Tax-Deferred Pension (On W-2: Box 12-12D, codes D, E, F, G, H, J or S) | |
| Tax-Exempt Interest (line 2a) | |
| Workers' Compensation | |
| Child support received | |
| Social Security Benefits for all household members (subtract line 5b from line 5a) | |
| IRA/pension (Subtract line 4b from line 4a) | |
| Other. List source: | |

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.

PARENT SIGNATURE

DATE