

## 2021-22 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 2019 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 2019 lost his/her job and was unemployed during 2020
- A parent/stepparent who earned money in 2019 lost his/her job and has been unemployed for at least 9 weeks in 2021
- 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
- **Signed** 2020 Federal Tax Return along 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 2021, 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 2018 and has had, or will experience, a complete loss of this support in 2020 or 2021

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 2019 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
- **Signed** 2020 Federal Tax Return 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 2021 income using chart on Page 2
- **If either the custodial or non-custodial parent is remarried**, new spousal income must be included in 2021 estimates. Further, if the remarriage occurred during the 2020 tax year, you must submit that spouse's **signed** 2020 Federal Tax Return with **all** schedules and corresponding W-2 Forms even if you did not nor were required to file with him/her

# 2021-22 Change in Family Circumstances Form (Page 2)

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Death of a wage earner after 2019 tax year

Date of Death: \_\_\_\_\_

**Required Supporting Documentation:**

- **Signed** 2020 Federal Tax Return 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 2021 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	2021 Estimate
Father/stepfather's taxable wages (line 1)	
Mother/stepmother's taxable wages (line 1)	
Rental/business income (Schedule 1 lines 3+6, Schedule K-1 form 1065, Box 14 Code A). If negative, use minus sign	
IRA distribution, pension distribution, SS benefits (lines 4a, 4c, & 5a)	
Unemployment Compensation (Schedule 1 line 7)	
Other (taxable interest, ordinary dividends, capital gains, etc.) List source:	
<b>Total Income</b> (line 7b)	
Less Health Savings deductions, self-employed SEP/SIMPLE plans, and IRA (Schedule 1 lines 12, 15 & 19)	
Less any other adjustments to income (Schedule 1 lines 10-22, <b>excluding 12, 15 &amp; 19</b> )	
<b>Adjusted Gross Income</b> (line 8b)	

Estimated Untaxed Income	2021 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 AND 4d from 4c)	
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