

## 2023/24 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 2021 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 2021 lost his/her job and was unemployed during 2022
- A parent/stepparent who earned money in 2021 lost his/her job and has been unemployed for at least 9 weeks in 2023
- 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 2022 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 2023, 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 2021 and has had, or will experience, a complete loss of this support in 2022 or 2023

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 2021 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 2022 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 2023 income using chart on Page 2.
- If either the custodial or non-custodial parent is remarried, new spousal income must be included in 2023 estimates. Further, if the remarriage occurred during the 2022 tax year, you must submit that spouse's signed 2022 Federal Tax Return 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 2021 tax year

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

Required Supporting Documentation:

- Signed 2022 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 2023 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	2023 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 4b, 5b, & 6b)	
Unemployment Compensation (Schedule 1 line 7)	
Other (taxable interest, ordinary dividends, capital gains, etc.) List source:	
Total Income (line 9)	
Less any adjustments to income (Schedule 1 line 26)	
Adjusted Gross Income (line 11)	

Estimated Untaxed Income	2023 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 6b from line 6a)	
Health Savings deductions, self-employed SEP/SIMPLE plans, and IRA (Schedule 1 lines 13, 16 & 20)	
IRA/pension (Subtract line 4b from 4a AND 5b from 5a)	
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