



SPECIAL CIRCUMSTANCES REQUEST FORM 2020-2021

STUDENT NAME: _____ STUDENT ID: B00 _____

Concordia University Texas (CTX) has established a process to allow for adjustments to an individual's federal aid application based on special circumstances. When considering the request, CTX takes into account the availability of funds, the timeliness of the original application for financial aid, the timeliness of the request and the nature of the change in circumstances. It is important to know that not all changes in circumstances will result in an adjustment to the student's eligibility. Requests are reviewed after all supporting documents are received. Students will be notified in writing via their ctx.edu email regarding the decision after a review of the request and required documentation is complete.

Circumstances generally *not* considered to be extraordinary and extenuating are:

- those made by choice
- those that would be a normal expense for families such as utility bills or household maintenance
- parents refusal to contribute to the student's education
- parents unwillingness to provide information on the FAFSA or for verification
- student not claimed by parents as a dependent for income tax purposes
- student demonstrating total self-sufficiency

BEFORE A REQUEST IS CONSIDERED, THE 2020-2021 FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA) MUST BE FILED.

REQUIRED DOCUMENTATION FOR ALL SPECIAL CIRCUMSTANCES REQUESTS

In order for financial aid to review the special circumstances, submit the following documentation with this form. Please include student's name and student ID number on the top of each page submitted. **Failure to support the circumstances with evidence will result in the request being denied for lack of documentation.**

- Letter of Explanation: write a detailed description of the special circumstances that affect your financial situation
- If your application was selected by the US Department of Education for verification, you must submit all required verification documents before your special circumstance will be reviewed

Please submit all documentation via fax or mail. Please do not send sensitive documents through email.

CHECK EACH CIRCUMSTANCE AFFECTING YOUR FINANCIAL SITUATION

Additional documentation may be required upon review.

- Death of student's parent (if dependent) or spouse (if independent):** Submit documentation such as a death certificate. Also include information regarding life insurance payout or other death benefits.
- Loss of benefits (e.g., social security, Veterans' benefits, retirement income, or unemployment):** Provide documentation showing reduction and effective date.
- Excessive medical expenses not covered by insurance:** Include a statement of account to confirm amounts PAID by you in 2019. This does not include what you owe (unpaid expenses).

STUDENT NAME: _____ STUDENT ID: B00_____

Decrease in parent income (if dependent) in 2019 or student/spouse income (if independent): If due to job loss, it must have occurred at least 90 days prior to submitting this form. Submit letter of termination from the employee's human resource department or supervisor showing the last day worked. Documentation of severance pay, vacation pay, retirement benefits, unemployment and/or disability benefits is also required. Submit a copy of your final paycheck stub(s) showing amount earned in the year.

Dependent students complete:

(Students who included parent's financial information on the FAFSA)

Independent students complete:

(Students who did NOT include parent's financial information on the FAFSA)

Father's Estimated 2019 Income: \$ _____

Student's Estimated 2019 Income: \$ _____

Mother's Estimated 2019 Income: \$ _____

Spouse's Estimated 2019 Income: \$ _____

Student's Estimated 2019 Income: \$ _____

(if applicable)

Divorce or separation of student's parent (if dependent) or student (if independent) after the FAFSA has been filed: Submit a Household Size Worksheet documenting the household as stated on the FAFSA along with a description of the Household Size from this point forward. Provide both 2018 and 2019 tax returns and W-2s for both parents (if dependent) or both student and spouse (if independent). A copy of the divorce decree or if separated, proof of separate households (lease, bills, etc.) and a statement from a professional documenting the separation (marriage counselor, lawyer, etc.) must be provided.

Marriage of the student after the FAFSA has been filed and student is classified as a dependent: Submit an Independent Household Size Worksheet, the marriage certificate, and both 2018 and 2019 tax returns and W-2s for both the student and spouse.

Certification of Understanding: The information I submit in support of this application is true and complete to the best of my knowledge. I agree to provide proof of all information as indicated above. I understand that approval of this request does not assure approval of a similar future request and that any financial assistance offered limited by the availability of funds in any given year. I understand that the information provided in past information may be reviewed for accuracy and this can impact the outcome. Further, the accuracy of the information I submit in this application can affect the outcome of any future appeals I may submit.

Student's Signature

Date

Parent's Signature (if dependent) OR
Spouse's Signature (if independent and married)

Date

Cell Phone Number

Parent's Email (optional)

All special circumstances reviews and adjustments are at the discretion of CTX Student Financial Services. SFS can only consider special circumstances when documentation provided will satisfy a review of your file by federal auditors.

Student Financial Services
11400 Concordia University Drive
Austin, TX 78726-4141

Student Central Phone: 1.512.313.4700
Student Financial Services Fax: 1.512.313.1670
Email: financialaid@concordia.edu