



2018-2019 Special Circumstances Form

Student Name: _____ Student ID # _____

MSU E-mail Address: _____

This form should be completed and returned to the Financial Aid Office if you, your spouse, or a parent has incurred an unusual expense or unusual circumstance.

Who incurred the unusual expense or circumstance: Student ____ Spouse ____ Father ____ Mother ____

If requesting a budget increase, indicate the amount of additional funding you are requesting: \$ _____

DOCUMENTATION

Supporting documentation that verifies your unusual expense or unusual circumstance must be attached. Forms submitted with incomplete documentation will not be processed.

Please check off your unusual circumstance from the list below. See the back of this form for the required documentation for each circumstance.

- | | |
|--|--|
| <input type="checkbox"/> Childcare expenses | <input type="checkbox"/> Housing costs |
| <input type="checkbox"/> Computer purchase | <input type="checkbox"/> Commuting expense |
| <input type="checkbox"/> Death of a family member | <input type="checkbox"/> Separation or divorce |
| <input type="checkbox"/> Loss of benefits | <input type="checkbox"/> Liquidation or foreclosure of assets |
| <input type="checkbox"/> Roth IRA rollover | <input type="checkbox"/> Loss/change of employment |
| <input type="checkbox"/> Parent enrolled in college | <input type="checkbox"/> Medical expenses |
| <input type="checkbox"/> Elementary/secondary school tuition expense | <input type="checkbox"/> Tuition Costs in excess of Cost of Attendance |

All the information provided by the undersigned is true and complete to the best of my/our knowledge. I/we further understand that purposely giving false or misleading information to obtain student financial aid may subject me/us to fines and other penalties.

Student signature: _____ Date: _____

IMPORTANT: All attachments (letters of explanation, etc.) must be signed, dated and reflect the name and student ID number of the student. Your appeal will be evaluated at the earliest available date. Please allow a minimum of two to four weeks for processing this form.

Unusual Circumstance	Documentation
Child Care Expense	Letter listing: a. Name and age of dependent(s) b. Hourly rate paid and total monthly cost c. Name & address of provider d. Source and amount of childcare assistance received
Housing Costs	1. Copy of rental agreement or mortgage payment 2. Copy of most recent monthly utility bills
Computer Purchase	Copy of purchase order or receipt for purchase of a computer (purchased between August 2018 and May 2019)
Commuting Expense	Letter listing: a. Number of miles traveled each day b. Where you are traveling from
Death of a Family Member	1. Letter listing: a. Relationship of deceased to the student 2. Copy of obituary 3. Copy of 2016 and 2017 federal tax return and W2's
Separation or Divorce	1. Letter listing: a. Revised household members 2. Copy of divorce decree or proof of separation 3. Copy of 2016 and 2017 federal tax return and W2's
Loss of Benefits	1. Letter listing: a. Whose benefit(s) was terminated b. Amount of benefit(s) received for last two years c. Reason for termination 2. Copy of document from provider stating termination 3. Copy of 2016 and 2017 Federal tax return and W2's
Liquidation or Foreclosure	1. Letter listing: a. Type of asset liquidated b. Gross sales proceeds c. List of where proceeds were applied 2. Copy of foreclosure notice 3. Copy of 2016 and 2017 federal tax return and W2's
Roth IRA Rollover	1. Copy of documents from investment agency verifying the rollover of pension or IRA to a Roth IRA 2. Copy of 2016 and 2017 federal tax return and W2's
Loss/Change of Employment or separation from military	1. Letter listing a. Who lost/changed employment b. Reason for loss or change of employment c. Income earned and untaxed income (Worker's Compensation, unemployment benefits, disability benefits, etc) to date of termination (per family member) d. Projected income and untaxed income to the end of 2018 2. Copy of last pay stub from all employers for 2017 3. Copy of 2016 and 2017 federal tax return and W2's
Parent Enrolled in College	Letter listing: a. Which parent is enrolled and number of enrolled credits b. Benefit amount received from employer towards education c. Statement from their college stating the parent is enrolled ½ time or greater in a degree granting program
Medical Expenses	1. Letter listing: a. Who incurred the expense(s) 2. List of medical expenses incurred 3. Copy of Explanation of Benefits from insurance carrier 4. Copy of medical bills
Elementary/Secondary School Tuition	Letter listing: a. Person for whom tuition is being paid b. Copy of tuition contract
Tuition	Actual cost of tuition and fees as charged on MSU student account will be used.