



WLU Special Circumstance Policy

Your eligibility for financial aid is initially calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). The US Department of Education uses a consistent evaluation of the family's ability to pay for college. Their formula assumes that 2022 income is a good indicator of the family's financial strength during the 2024-2025 academic year.

WLU's Office of Financial Aid understands that families experience changes in income or other family circumstances that may not be reflected in the 2022 income and asset information. Completing this form, allows our office to evaluate and adjust on a case-by-case basis, with adequate documentation, elements on the FAFSA to potentially capture a more accurate picture of the student's financial situation.

Examples of Special Circumstances Accepted

- Changes to family income or assets
- Separation or Divorce
- Death of parent/spouse
- Recent unemployment of student, spouse or contributing parent
- Medical, dental or nursing home expenses not covered by insurance
- Tuition expenses at an elementary school, secondary school or child/dependent care
- Severe disability of the student or other member of the student's household

Examples of Special Circumstances NOT Accepted

- Home repairs
- Credit card debt
- Car payments/insurance
- Mortgage payments
- Previous educational debt

The 2024-2025 FAFSA must be on file with WLU before this application can be submitted. The Director of Financial Aid does review all requests for special circumstances. In order for the review to begin, the student must provide this form and all applicable documentation requested. If the student is selected for verification or conflicting data, that process must be completed before any special circumstance adjustments will be made.

Special circumstances are reviewed as soon as possible but no later than 60 days after the student enrolls. Once the determination is made, the final decision will be communicated with the student.

2024-2025 Special Circumstances Form

Submit this form **after** you have filed the Free Application for Federal Student Aid. This form must be accompanied by all required documentation or your request will be **denied**. Please check below the circumstance that applies to you, then go to that number on the next page to complete/confirm the required documentation.

- Changes to family income or assets
- Separation or Divorce
- Death of parent/spouse
- Recent unemployment of student, spouse or contributing parent
- Medical, dental or nursing home expenses not covered by insurance
- Tuition expenses at an elementary school, secondary school or child/dependent care
- Severe disability of the student or other member of the student's household
- Other circumstance not listed on this form

Student's Information:

Last Name: _____ First Name: _____ Middle Initial: _____

Social Security Number (required): _____ Date of Birth (required): _____

Street Address: _____ City: _____

State: ____ Zip Code: _____ Email: _____ Cell Phone: _____

Return this completed form to our office with the documentation specified. Please find an appropriate list of the requested documentation on the next page.

By signing this worksheet, I (we) certify that all the information reported is complete and correct. If spouse information is provided, he/she must also sign this form. If the student is dependent as determined by the FAFSA, one parent contributor's signature is required.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Signature

Date

Parent Signature

Date

Student Spouse Signature if Applicable

Date

1. Change to family income or assets

- Name of person who had the reduction in income. _____
- Letter from student/parent explaining circumstances surrounding the reduction of income.
- Anticipated income for 2024 – Most recent paycheck stub with Year-To-Date information
- All 2022 and 2023 W-2's
- 2022 and 2023 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

2. Separation or Divorce

- Name of the Parent whose information will remain on the FAFSA. _____
- Has the parent listed remarried? _____ Yes _____ No
- Legal documentation verifying separation or divorce
- All 2022 and 2023 W-2's
- 2022 and 2023 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

3. Death of parent/spouse

- Copy of death certificate
- All 2022 and 2023 W-2's
- 2022 and 2023 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

4. Recent Unemployment of student, spouse or contributing parent

- Name of person who lost job. _____
- Last date of employment _____
- Has new employment been found? _____ Yes _____ No Start Date ____/____/____
- Statement explaining circumstances surrounding the loss of employment
- Last pay stub with year-to-date income information from job lost
- Most recent paystub if new employment has been found
- All 2022 and 2023 W-2's
- 2022 and 2023 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

5. Medical, Dental or Nursing Home expenses not covered by insurance

- Statement explaining circumstances surrounding the expenses
- All documents for the current calendar year showing amounts paid to directly cover costs
- All 2022 W-2's
- 2022 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

6. Tuition expenses at an elementary school, secondary school or child/dependent care

- Letter from school verifying current expenses
- All 2022 W-2's
- 2022 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

7. Severe disability of the student or other member of the student's household

- Statement explaining circumstances surround the expenses
- All documents for the current calendar year showing amounts paid to directly cover costs
- All 2022 W-2's
- 2022 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)

8. Other Circumstances not listed on this form

- Written explanation of special circumstance request
- Documentation to support a significant impact to the household income
- All 2022 and 2023 W-2's
- 2022 and 2023 **physically signed** 1040's or Tax Return Transcript (www.irs.gov)