

**TEXAS A&M UNIVERSITY - CORPUS CHRISTI**  
**OFFICE OF STUDENT FINANCIAL ASSISTANCE**  
2009-2010 SPECIAL CIRCUMSTANCES FACT SHEET

The Free Application for Federal Student Aid (FAFSA) allows families to provide a snapshot of their income and assets that is used to determine your financial aid eligibility and package. Using this information all students undergo a consistent evaluation of the family's ability to pay for the direct costs of attending school. However, for some students this snapshot does not reflect their current financial situation. As a result, the U.S. Department of Education has given financial aid administrators limited authority to re-evaluate individual circumstances to help create a more appropriate financial aid award package. Below is a checklist of circumstances under which adjustments to your financial aid eligibility may be considered.

**If you were required to report parental information on the FAFSA:**

- Since applying for aid, has your parent or stepparent lost his or her job for at least 10 weeks in 2009?
- Since applying for aid, has your parent or stepparent been unable to work and earn money in the usual way due to a disability or natural disaster for at least 10 weeks in 2009?
- Did your parent or stepparent receive unemployment compensation or some untaxed income or benefit (such as court ordered child support or income or benefits from a public agency) in 2008? If so, have they lost that benefit for at least 10 weeks in 2009?
- When you completed your FAFSA, were your parents married? Are they now legally separated or divorced?
- Has one of your parents died since you completed the 2009-2010 FAFSA?
- Have your parents incurred other non-discretionary expenses (expenses not associated with lifestyle or personal choice) which are a financial obstacle to attending school? Examples: private school tuition for a child with special education or medical needs, excessive medical costs not covered by insurance or reimbursed by another source, care for an elderly dependent parent, etc.

**If you were not required to report parental information on the FAFSA:**

- Since applying for aid, have you lost your job for at least 10 weeks in 2009?
- Since applying for aid, did your spouse lose his or her job for at least 10 weeks in 2009?
- Since applying for aid, have you or your spouse been unable to work and earn money in the usual way due to a disability or natural disaster for at least 10 weeks in 2009?
- Did you or spouse receive unemployment compensation or some untaxed income or benefit (such as court ordered child support or income or benefits from a public agency) in 2008? If so, have that benefit been lost for at least 10 weeks in 2009?
- When you completed your FAFSA, were you married? Are you now legally separated or divorced?
- Has your spouse died since you completed the 2009-2010 FAFSA?
- Do you incur other non-discretionary expenses (expenses not associated with lifestyle or personal choice) which are a financial obstacle to attending school? Examples: private school tuition for a child with special education or medical needs, excessive medical costs not covered by insurance or reimbursed by another source, care for an elderly dependent parent, etc.

**If you answered yes** to any of these questions, you may qualify for re-evaluation of your financial aid eligibility. Please complete the appropriate section(s) of the 2009-2010 Special Circumstances Application that pertain to your individual situation.

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**OFFICE OF STUDENT FINANCIAL ASSISTANCE**  
2009-2010 SPECIAL CIRCUMSTANCES APPLICATION

**Complete the application, provide signed copies of yours and/or your spouses/parent's 2008 tax returns, complete an Institutional Verification Form, and return all documentation to the Office of Student Financial Assistance.**

Name \_\_\_\_\_ Student ID \_\_\_\_\_

**Dislocated Worker/Loss or reduction of income from work:** Please check the circumstance which best applies to your situation and complete the Income Worksheet on page 3 of this form.

- 9 **Termination** Provide an official letter from employer stating the effective date of termination. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer=s statement, etc.) and signed copies of your (Independent) or your parent=s (Dependent) 2008 tax return.
- 9 **Disability** Attach medical documentation of disability with the effective date of the disability. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer=s statement, etc.) and signed copies of your (Independent) or your parent=s (Dependent) 2008 tax return.
- 9 **Layoff** Provide an official letter from employer stating the effective date of the layoff and anticipated return. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer=s statement, etc.) and signed copies of your (Independent) or your parent=s (Dependent) 2008 tax return.
- 9 **Reduced employment** Provide an official letter from employer stating the effective date. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer=s statement, etc.) and signed copies of your (Independent) or your parent=s (Dependent) 2008 tax return. **Note:** quitting your job or reducing your hours to attend school is not considered a special circumstance, but a lifestyle choice and do not qualify for a special circumstance.

**Divorce/Separation/Dislocated Homemaker:** Complete the Income Worksheet on page 3 of this form.

- 9 Since applying for financial aid, you and your spouse (I) or your parent=s (D) have become divorced or separated. Provide legal documentation containing the date of the divorce or separation, copy(ies) of 2008 W-2 (s) and a signed copy of 2008 federal tax return.

**Death of Spouse/Parent:** Complete the Income Worksheet on page 3 of this form.

- 9 Since applying for financial aid, your spouse (I) or a parent (D) is no longer living. Provide documentation of the date of death, copy(ies) of 2008 W-2 (s) and a signed copy of 2008 federal tax return.

**One-Time Income:** Complete the Income Worksheet on page 3 of this form.

- 9 In 2008, you and your spouse (I) or your parents (D) received a one-time source of income such as: inheritance, moving expense allowance, back-year social security payments, severance pay package, IRA distribution, etc. Provide a signed copy of 2008 tax return indicating moving expenses, IRA distribution, etc., or documentation from the Social Security Administration for back-year payments. **Note:** Winnings from gambling are not considered a special circumstance.

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List the one-time source of income

**Loss of Benefits:** Complete the Income Worksheet on page 3 of this form.

- 9 Provide documentation from the appropriate agency stating when benefits ceased; i.e. Social Security benefits, court ordered child support, welfare benefits, untaxed retirement or disability benefits. Signed copies of your (Independent) or your parent=s (Dependent) 2008 tax return.

**Elementary/Secondary Education and Adult Care Expenses**

- 9 Provide documentation for each family member you included in your family size on your application for financial aid for whom you (I) or your parents (D) paid tuition/fees for private elementary/secondary education, or adult care expenses. Documentation required: Signed 2008 tax return (to verify dependents) and receipts for tuition or adult care payments made in 2008.

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Name of Family Member	Relationship to Student
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**Include Parents in the Number in College (Dependent Students Only)**

- 9 Your parents can not automatically be included in the number in college. If your parents are pursuing an undergraduate or graduate degree, an adjustment to your financial aid application can be made. Provide a signed copy of parent=s degree plan from the school or university they are attending or a copy of their academic transcript.

**Unusually High Medical/Dental Expenses:**

- 9 **Note:** Medical/dental expenses up to 11% of the family=s total income are already taken into account by the Federal Needs Analysis Formula when determining financial aid eligibility. Therefore, *only the portion of expenses which exceed 11% will be considered an unusual circumstance.*

If you or your spouse (I) or your parents (D) itemized medical/dental expenses in 2008, provide a signed copy of the 2008 tax return, including Schedule A. If medical/dental expenses were not itemized in 2008, provide receipts of medical/dental expenses paid in 2008 and prepare a Schedule A using that information.

List below the family member for whom medial/dental expenses were incurred in 2008:

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Name of Family Member	Relationship to Student
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**SUMMARY OF SPECIAL CIRCUMSTANCES**

Please summarize your special circumstances. Use back of form if additional space is needed.

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## 2009 Income Worksheet

**Do not leave any blanks - worksheet must be completed.**

Source: <b>You must provide documentation of ALL sources of income, e.g. last pay stub, statement from employer, Social Security statement, etc.</b>	Actual 1/1/09 - Today	Estimated Today -12/31/09	Total Actual+Estimate
Expected 2009 income earned from work by student	\$	\$	\$
Expected 2009 income earned from work by spouse (I)			
Expected 2009 income earned from work by father (D)			
Expected 2009 income earned from work by mother(D)			
Other taxable income: Include dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.			
Social Security Benefits			
Temporary Assistance to Needy Families (TANF)			
Child Support			
Other untaxed income: welfare benefits, earned income credit, etc.			
<b>TOTAL Estimated 2009 INCOME</b>	\$	\$	\$

**Certification:** I (we) certify that the information provided on this form, and the accompanying documentation, is true and complete to the best of my (our) knowledge. I (we) agree to provide proof of the information that I (we) have given on this form if requested by the Office of Student Financial Assistance. If I (we) do not provide the requested documentation, my Special Circumstances Application will not be processed.

Student=s signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse=s signature (I) \_\_\_\_\_ Date \_\_\_\_\_

Parent=s signature (D) \_\_\_\_\_ Date \_\_\_\_\_

***For office use only***

Prior year special circumstances: 9 Yes 9 No

9 Special Circumstances Approved

9 Special Circumstances Denied

Comments:

This form is to be used by a student to reflect any sudden life changes (loss of job, medical expenses, death of a family member, etc.) that may impact their 2009-2010 financial aid awards.

### **Additional documentation required**

- A copy of your 2008 tax return
- A copy of your spouse's 2008 federal tax return – *only if you are married*
- A copy of your parent(s)/stepparent(s) 2008 federal tax return(s) – *only if you are a dependent*
- A completed copy of the 2009-2010 Institutional Verification Worksheet
- Documentation verifying your extenuating circumstance

Please be sure to attach the above-mentioned documentation to your form.

### **How to complete this form**

When completing the form, please print clearly to allow for correct processing. Note that your Student ID is your University-assigned student ID that begins with the letter "A" and is followed by numerals. Please attach all necessary documentation to this form upon submission.

### **Submission instructions**

Once completed, you can mail, fax, or drop off your form in person to:

#### **By postage mail:**

Texas A&M University-Corpus Christi  
Office of Student Financial Assistance  
6300 Ocean Drive, Unit 5772  
Corpus Christi, Texas 78412-5772

#### **By fax:**

361.825.6095

Re: *Special Circumstances Form for [Student's full name]*

#### **In person:**

Office of Student Financial Assistance  
1<sup>st</sup> floor, Student Services Center (Round Building)

Due to stringent security issues, any information submitted via e-mail will not be processed.

### **How your form is processed**

Once your form has been received by the Office of Student Financial Assistance, it takes 1-2 weeks to process. To check on the processing status of your form, please contact the Office of Student Financial Assistance by phone at 361.825.2338.