



Financial Aid Office

2021-22 Special Conditions Form

If you have special circumstances that were not reflected on the FAFSA, you may use this form to notify the Financial Aid Office. We will review your situation on an individual basis and will determine if a professional judgement is warranted. There is no guarantee additional aid will be awarded. If you are an undergraduate and resident of Pennsylvania, contact PHEAA at 1-800-692-7392 concerning state grant. Special Conditions forms processed by the Financial Aid Office do not impact state grant eligibility. If you have questions, contact the Financial Aid Office at 412-578-6389 or finaid@carlow.edu.

Student's Name _____

Student ID _____

Section 1. Indicate the reason for the request and for whom the request has been made. Follow the applicable instructions.

✓	Reason:	For:	Attach	Instructions
	Actual 2020 income less than 2019 income	<input type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Parent(s)	-Signed copy of 2020 tax return -Copies of W2 form (s)	Complete section 4
	Anticipated 2021 income less than 2019 income	<input type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Parent(s)	-Employer letter/document stating when employment ended or changed -Unemployment benefits statement if applicable -Copy of most recent pay stub if any employment in 2021	Complete section 2, 3 & 4
	Loss of one-time income	<input type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Parent(s)	Pertinent documentation	Complete sections 3 & 4
	Unusually high medical expenses	<input type="radio"/> Student <input type="radio"/> Spouse <input type="radio"/> Parent(s)	-Documentation of amounts paid in 2019 or 2020, not covered by insurance -Signed copy of 2019 or 2020 tax return along with all schedules	Complete sections 3 & 4
	Divorce/ separation after 2021-22 FAFSA was filed	<input type="radio"/> Student <input type="radio"/> Parent(s)	-Divorce decree or documentation to verify separate addresses -Signed copy of 2019 tax return unless Data Retrieval Tool was used -Copies of 2019 W2 form(s) for student or custodial parent	Complete section 3 & 4
	Death of parent or spouse after 2020-21 FAFSA was filed	<input type="radio"/> Student's spouse <input type="radio"/> Student's parent	-Copy of death certificate -Signed copy of 2019 tax return unless Data Retrieval Tool was used -Copies of all 2019 W2 Wage Statements for student/surviving parent	Complete section 3 & 4
	Other			Contact the Financial Aid Office

Section 2 – Complete **Column A** if the income reduction is for the student (and spouse if married). Complete **Column B** if the student is dependent and the income reduction is for parent(s). Provide a value for each line item, even if \$0. Values should reflect PROJECTED annual amounts for **1/1/21 -12/31/21**. **Do not complete this section if your 2020 income was less than 2019 income. In that case, attach a signed copy of your 2020 tax return.**

PROJECTED 2021 INCOME. DO NOT LEAVE ANY ITEM BLANK	A. Student/Spouse Information	B. Parent (s) Information
1. Student's wages, salaries, tips	\$	
2. Spouse's wages, salaries, tips (if married)	\$	
3. Parent 1 wages, salaries, tips		\$
4. Parent 2 wages, salaries, tips		\$
5. Severance pay	\$	\$
6. Taxable portions of pensions, annuities, 401(k), IRA distributions.	\$	\$
7. Taxable portions of interest and dividend income	\$	\$
8. Business or farm income	\$	\$
9. Capital gains	\$	\$
10. income that will be received from rents after expenses paid for mortgage interest, taxes and insurance	\$	\$
11. Alimony which will be received	\$	\$
12. Unemployment compensation	\$	\$
13. Taxable portions of all Social Security benefits	\$	\$
14. Other taxable income	\$	\$
Projected 2021 Untaxed Income	Student/Spouse	Parent(s)
1. Payments to tax-deferred pension & savings plan (paid directly or withheld from earnings), including, but not limited to, amounts which would be reported on the W-2 forms in Boxes 12a - 12d, codes D,E,F,G,H, and S.	\$	\$
2. IRA deductions & payments to self-employed SEP, SIMPLE, Keogh and other qualified plans	\$	\$
3. Child Support which will be received	\$	\$
4. Tax exempt interest income	\$	\$
5. Untaxed portions of IRA or pension distributions	\$	\$
6. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$	\$
7. Veterans' non-education benefits	\$	\$
8. Worker's Compensation	\$	\$
9. Other untaxed income	\$	\$

