

# CARLOW UNIVERSITY

## Financial Aid Office

### 2022-23 Independent Student Special Conditions Form

If you have special circumstances that were not reflected on your 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. Submission of this form does not guarantee additional financial aid. *Note: If you are an undergraduate and resident of Pennsylvania you should contact PHEAA at 1-800-692-7392 concerning PA State Grant. Special Conditions forms processed by the Financial Aid Office do not impact state grant eligibility.*

Student's Name \_\_\_\_\_

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

#### Section 1 – indicate the applicable reason for the request and see instructions

✓	Reason	Instructions
	<b>Actual 2021 income less than 2020 income report on FAFSA</b>	Complete section 4 and attach signed copy of 2021 tax return AND W2 form(s)
	<b>Anticipated 2022 income less than 2020 income reported on FAFSA</b>	Complete sections 2, 3, 4 and attach documentation from employer, copy of most recent pay stub, unemployment benefits statement if applicable, and any other pertinent documentation
	<b>Loss of one-time income</b>	Complete sections 3 & 4 and attach pertinent documentation
	<b>Unusually high medical expenses</b>	Complete sections 3 & 4 and attach documentation including signed copy of applicable tax return with all schedules
	<b>Divorce/separation after 2022-23 FAFSA was filed</b>	Complete sections 3 & 4 and attach divorce decree or documentation to verify separate addresses AND signed copy of 2020 tax return and W2 forms
	<b>Death of spouse after 2022-23 FAFSA was filed</b>	Complete sections 3 & 4 and attach copy of death certificate, signed copy of 2020 tax return and W2 forms

**Section 2** – Use this section to report your ANTICIPATED income for 2022 (January 1, 2022 – December 31, 2022). Provide a value for student and spouse when married. Do not leave any item blank. Enter 0 when applicable.

Anticipated 2022 Taxable Income for Student / Spouse	
Student's anticipated 2022 wages, salaries, tips	\$
Spouse's anticipated 2022 wages, salaries, tips	\$
Severance pay	\$
Taxable portion of pensions, annuities, 401(k), 403(b), IRA distributions	\$
Taxable portions of interest and dividend income	\$
Business or farm Income	\$
Capital gains	\$
Income that will be received from rents after expenses paid for mortgage, interest, taxes and insurance	\$
Alimony that will be received	\$
Unemployment compensation	\$
Taxable portions of Social Security Benefits	\$
Other taxable income	\$
Anticipated 2022 Adjusted Gross Income	\$
Anticipated 2022 Untaxed Income for Student / Spouse	
Payments to tax-deferred pension & savings plan including, but not limited to, amounts would will be reported on W2 forms in boxes 12a – 12d, codes D,E,F,G,H,S	\$
IRA deductions & payments to self-employed SEP, SIMPLE, Keogh and other qualified plans	\$
Child support that will be received	\$
Tax-exempt interest income	\$
Untaxed portions of IRA or pension distributions	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$
Veterans' non-education benefits	\$
Worker's compensation	\$
Other untaxed income	\$

**Section 3.** In the space provided, please explain the details of your special conditions as indicated in Section 1. Please be as specific and thorough as possible. Attach pertinent documentation if necessary.

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**Section 4** – Sign below to acknowledge that the anticipated income provided on this document is true and accurate to the best of your knowledge.

Student’s Signature\_\_\_\_\_Date\_\_\_\_\_

Mail or email Special Conditions form with all necessary documentation as indicated in Section 1 to:

**Carlow University**  
**Financial Aid Office/Student HUB**  
**3333 Fifth Avenue**  
**Pittsburgh, PA 15213**  
[finaid@carlow.edu](mailto:finaid@carlow.edu)

Or, you may upload documents into your self-Service record.