

2022-2023 Special Circumstances Review

The Financial Aid Office recognizes that there are times when it is necessary to re-evaluate a student's eligibility for financial aid:

- the family has experienced a **Change in Financial Circumstances**;
- the student is classified as "dependent" but is unable to provide parent information on the FAFSA may request **Dependency Status Review**; or
- the student needs additional loan funding for educational expenses and requires a **Cost of Attendance Budget Adjustment**.

Please check the box below to indicate which type of special circumstances you would like us to consider. Submit the required documentation either by email to pjrequest@fa.monmouth.edu, by fax to 732-263-5577, or by mail to Monmouth University Financial Aid Office, 400 Cedar Avenue, West Long Branch, NJ 07764. Please note that your request for a special circumstances review will not be processed until you have supplied **all** documentation.

Student's Full Name:

Student's ID:

Student's Email:

Alternate Email:

Parent's Full Name:

Parent Email:

Best Telephone Number to Reach You:

Change in Financial Circumstances

Only those circumstances that are beyond the student's or family's control will be considered for review. Examples of circumstances that will not be considered are: consumer debt, bankruptcy, private school tuition, parent unwillingness to complete the financial aid application, voluntary reduction in overtime, etc.

Unemployment

- Name of unemployed person:
- Relationship to student:
- Has the person returned to work? Yes No
If yes, indicate date:
- Signed copy of Spouse/Parent(s) 2021 Federal Income Tax Return, including all pages
- Spouse/Parent(s) 2021 W-2's
- Notice of termination from former employer with last day of employment and severance/vacation/sick pay included (if applicable)
- Copy of 'Notice of Benefit Determination' from unemployment
- Verification of retirement or medical disability
- Last pay stub and current pay stub (only if person has returned to work)

Student Loss of Full-Time Work

- Student is currently working: Part-time Unemployed
- Reason for change in employment status (Briefly describe below):

- Signed copy of Student's 2021 Federal Income Tax Return and Student 2021 W-2's

- Last pay stub at full-time
- Most recent pay stub at part-time

Divorce or Separation

- Date of divorce or separation:
- Name of parent student lives with:
- Monthly amount of support received:
 - Child Support (for all children): \$
 - Alimony: \$
 - Household Support: \$
- Signed copy of Student or Parent(s) 2021 Federal Income Tax Return, including all pages
- Student or Parent(s) 2021 W-2's
- Divorce decree (If the decree is not available, submit verification of different addresses. The following are acceptable proof separate residence: driver's license, signed leases, utility bills, etc.)

Death of a Parent or Student's Spouse

- Name of the deceased person:
- Date of Death:
- Date Social Security Benefits began:
- Monthly amount for all family members: \$
- Signed copy of Student and Parent(s) (if dependent) 2021 Federal Income Tax Return, including all pages
- Student and Parent(s) (if dependent) 2021 W-2's
- Death certificate

Loss of Untaxed Income

- Person who lost benefits:
- Type of benefits lost:
- Date benefits were lost: Total received in 2021: \$
- Signed copy of Student or Parent(s) 2021 Federal Income Tax Return, including all pages
- Student and Parent(s) 2021 W-2's
- Statement of terminated benefits
- Name of person incurring the expenses:

Unreimbursed Medical Expenses

- Unreimbursed medical expenses in 2020 or 2021.
- Signed copy of Student or Parent(s) 2020 or 2021 Federal Income Tax Return, including Schedule A (if filed)
- If Schedule A was not filed, cancelled checks and/or receipts for expenses paid AND statements from insurance company indicating that the expense is unreimbursed

- Other**
- Please provide a letter of explanation.
 - Contact the Financial Aid Office at 732-571-3463 to discuss your circumstances.

Dependency Status Review

You have been separated from your parents because of an unsafe home environment, or your parent has been institutionalized or is in a correctional facility.

You have been separated from your parents, come from a documented background of historical poverty, and are living with a relative or someone who is supporting you.

Other

- o Please provide a letter of explanation.
- o Contact the Financial Aid Office at 732-571-3463 to discuss your circumstances.

Provide the following information:

- o All supporting documentation (court documents, police reports, social service agency reports)
- o Third Party Reference. One letter from a non-family member who can attest to the student's situation. Examples of such a person include, but are not limited to: teacher, counselor, employer, clergy, social worker, attorney, court official, psychiatrist, psychologist, medical professional, law enforcement agent, etc.
- o Student's 2020 Federal IRS Tax Return Transcript or Tax Return
- o Student's 2020 W-2's
- o Please indicate how you paid for the living expenses itemized below.

Categories	Monthly Amount	By Whom (Relative, Roommate, etc.)
1. Rent (any amount paid on your behalf)	\$	
2. Utilities (Gas/electric, Phone, Water, etc.)	\$	
3. Cell Phone	\$	
4. Automobile Payments	\$	
5. Automobile Insurance	\$	
6. Automobile Maintenance/gas (Transportation)	\$	
7. Life Insurance	\$	
8. Health Insurance	\$	
9. Other Medical expenses paid on your behalf	\$	
10. Credit cards (bills paid on your behalf)	\$	
11. Clothing	\$	
12. An Allowance	\$	
13. Miscellaneous expenses: (please list in a & b)		
a.	\$	
b.	\$	

Cost of Attendance Budget Adjustments

Off-Campus

- Attach a letter listing all monthly expenses for off-campus living and transportation expenses. Such as rent, utilities, food, internet/cable, car maintenance, etc.

Child Care

- Attach a letter listing all monthly expenses for child care.

Educational Expenses

- Attach a letter listing all monthly expenses for educational expenses. Such as books, computer, lab equipment, etc
- Provide receipts (if applicable).

Other

- Please provide a letter of explanation.
- Contact the Financial Aid Office at 732-571-3463 to discuss your circumstances.