



How to submit an Appeal

The Expected Family Contribution (EFC) formula is the same for all applicants; however, we do understand that a family may have difficulty managing their expected family contribution due to changes in financial circumstances. If you believe you have a special situation that was not reflected in your aid materials, please follow the guidelines below if you wish to appeal your need-based aid package. Forward your complete appeal packet to your [advisor's](#) attention via email, USPS or fax.

A complete Appeal Packet should include:

- An accepted financial aid award
 - ◊ Appeals will only be considered for students who have accepted the current financial aid award in OPUS (see Important Notes below for more information)
- A completed Special Circumstance Appeal form
 - ◊ Section A - a written personal statement
 - ◊ Section B - identify the reason for your appeal, and attach supporting documentation
 - ◊ Section C - sign the certification statement
- Any documents you deem relevant to explain your situation
- Submit any supplemental or new tax documentation, if not already submitted to IDOC
 - ◊ Complete tax returns for all businesses - include forms 1065, 1120-S, 1120, K-1's, and the itemized list for "other deductions"
 - ◊ Amended tax return form 1040x
 - ◊ IRS tax data through FAFSA [Data Retrieval Tool](#) or as a [tax transcript](#) (optional, unless otherwise required)

Important Notes

- Timeliness, completeness and accuracy of your packet will impact the outcome of your appeal
- Additional information may be requested of you after providing the appeal and supporting documentation
- The Financial Aid Appeal Committee will only consider appeals for students who have accepted their financial aid awards, including loans.
 - ◊ **Students who choose to decline loan or work awards will not be considered for additional institutional grant assistance**
 - ◊ Use the [Accepting Your Awards Guide](#) for instructions to accept your award in the online student center in [OPUS](#)
 - ◊ Accepted awards may be revised by your advisor after your appeal is reviewed by the committee.
 - ◊ Awards accepted at Emory will only disburse if the student enrolls. Emory financial aid will be automatically cancelled for any student who does not enroll, and aid at other schools will not be impacted.
- Submission of a special circumstance appeal does not automatically ensure that your request will be approved
- If approved, it could result in an increase in institutional grant, institutional loan or a combination of both.
- If loans are declined after an appeal is approved, the appeal decision will be voided, and increases to grant reversed.



How to submit an Appeal (continued)

When to submit an Appeal

	Submission Deadline	Response Date
Admitted Freshmen	April 7, 2014	April 18, 2014
Admitted Freshmen	April 21, 2014	April 25, 2014
Admitted Transfer	May 12, 2014	May 16, 2014
Returning Students	July 21, 2014	July 31, 2014
Returning Student	August 11, 2014	August 17, 2014
Final 2014 Appeal Date	September 8, 2014	September 12, 2014

Appeals received after the deadline will be considered at the next scheduled date, and a response sent according to the schedule above.

Items not considered as an appeal for need-based financial aid:

- Financial support of grandparents, siblings older than 23, and non-immediate family members
- Consumer debt, such as credit cards or educational loan debt
- Job loss of less than 3 months
- Investments being held for others
- Requests to exclude retirement assets that are not invested in a traditional retirement account
- Student merit or achievements
- Aid or scholarships awarded at other institutions



Special Circumstance Appeal 2014-2015

Emory University
Office of Financial Aid
200 Dowman Drive, Suite 300
Atlanta, GA 30322

Phone: 404.727-6039
Fax: 404.727-6709
Email: finaid@emory.edu

Student's Name:	Emory ID (EMPL):
Email Note: Communications regarding this request will be sent via email to the student's email address marked as preferred in OPUS.	Last 4 Digits of Student SSN (if ID Number Unknown):

A: WRITTEN EXPLANATION OF SPECIAL CIRCUMSTANCES

Please attach a separate written statement detailing your circumstances and providing any pertinent information that will help us better understand your particular situation. Make sure to **sign** your written statement once completed. **This form will be incomplete if this information is not submitted.**

B: SPECIAL CIRCUMSTANCES FOR CONSIDERATION — Check any boxes that apply to your appeal request

<input checked="" type="checkbox"/>	REASON FOR APPEAL	REQUIRED DOCUMENTATION	
<input type="checkbox"/>	Loss of employment	<input type="checkbox"/> Date employment ended: ___ / ___ / ____ <input type="checkbox"/> Emory Projected Year Income worksheet <input type="checkbox"/> Last pay stub showing year to date earnings <input type="checkbox"/> Emory Monthly Income and Expenses worksheet	<input type="checkbox"/> Termination notice <input type="checkbox"/> Severance pay agreement <input type="checkbox"/> Unemployment benefits
<input type="checkbox"/>	Reduction in anticipated or current year income	<input type="checkbox"/> Emory Projected Year Income worksheet <input type="checkbox"/> Last pay stub showing year to date earnings <input type="checkbox"/> Emory Monthly Income and Expenses worksheet <input type="checkbox"/> Document termination of benefits	<input type="checkbox"/> Letter from employer confirming earnings reduction and effective date <input type="checkbox"/> Quarterly business earnings statement, or a quarterly business tax return
<input type="checkbox"/>	Receipt of one-time funds/income	<input type="checkbox"/> Document the amount and source of income <input type="checkbox"/> Signed statement explaining how funds were spent <input type="checkbox"/> Letter from employer confirming any overtime or bonus pay as one-time	Examples include: capital gain, inheritance, bonus, moving expense allowance, retirement distribution, etc.
<input type="checkbox"/>	Cannot afford home	<input type="checkbox"/> Emory Monthly Income and Expenses worksheet <input type="checkbox"/> Most recent mortgage statement or lease agreement <input type="checkbox"/> Foreclosure or short-sale documents	<input type="checkbox"/> Confirm home net worth from the county assessor website, or Zillow.com
<input type="checkbox"/>	Unusual expense	<input type="checkbox"/> Complete Sibling Enrollment form for a sibling at a high cost college <input type="checkbox"/> A statement explaining the unusual expense <input type="checkbox"/> Document the expense with receipts and bank statements <input type="checkbox"/> Emory Monthly Income and Expenses worksheet	
<input type="checkbox"/>	Death of a Parent	<input type="checkbox"/> Copy of the parent death certificate or newspaper obituary <input type="checkbox"/> Document the amount of any death benefits received <input type="checkbox"/> Emory Monthly Income and Expenses worksheet	
<input type="checkbox"/>	Incorrectly reported income or asset	<input type="checkbox"/> Emory Asset worksheet <input type="checkbox"/> 1099-R or 1099-G for retirement rollover <input type="checkbox"/> Trust agreement, IRS form 1041, and corpus value	<input type="checkbox"/> Monthly mortgage statement to confirm real estate debt and monthly payment <input type="checkbox"/> 3 months check/savings bank statements
<input type="checkbox"/>	General appeal	<input type="checkbox"/> Emory Monthly Income and Expenses worksheet <input type="checkbox"/> A statement explaining any circumstance not otherwise listed above <input type="checkbox"/> Any applicable supporting documentation	<input type="checkbox"/> A statement explaining why the aid deadline was missed



EMORY UNIVERSITY

Special Circumstance Appeal 2014-2015

Emory University
Office of Financial Aid
200 Dowman Drive, Suite 300
Atlanta, GA 30322

Phone: 404.727-6039
Fax: 404.727-6709
Email: finaid@emory.edu

Student's Name:	Emory ID (EMPL):
Email Note: Communications regarding this request will be sent via email to the student's email address marked as preferred in OPUS.	Last 4 Digits of Student SSN (if ID Number Unknown):

C: CERTIFICATION STATEMENT

I certify that the information I am providing is true, complete, and correct to the best of my knowledge. Both parent and student agree to notify the Office of Financial Aid if the circumstance described in the appeal changes, if employment is obtained, or other sources of income are found. I understand that the decision of the appeals committee will be emailed to the email address marked as preferred in OPUS.

Student's Signature _____ Date _____
 Parent's Signature _____ Date _____

Internal Use Only	
Review Date:	Advisor Initials;
Decision Comments:	