

Wingate University

Financial Planning: 2014-2015 Special Circumstance Application

Student Social Security No. Student Last Name First Name M.I.

Permanent Street Address City State Zip Code

(_____) _____
Home Telephone

(_____) _____
Work Telephone

If the Special Circumstance Application indicates adjustments can be made, I authorize Wingate University to make these changes electronically on my behalf.

Parent Signature Date Student Signature Date
(Required for Dependent Students)

Instructions: You have indicated that there are circumstances that may affect the results of your Free Application for Federal Student Aid (FAFSA). Please indicate the type of special circumstance that applies to you and your family and submit all the required documentation as listed below. You will be notified after your information is reviewed.

___ 1. **Unemployment** ___ Student ___ Mother ___ Father ___ Spouse

Period of unemployment ___/___/___ to ___/___/___.

___ Layoff: Provide letter from employer or unemployment commission stating effective date.

___ Termination: Provide letter from employer or unemployment commission stating effective date.

Documents Required:

- Statement from Employment Security Office of expected 2014 unemployment benefits (if applicable)
- Retirement pay statement for 2014 (if applicable)
- Completed Estimated Income Table for 2014 (on reverse side)
- Copy of 2013 IRS Federal Tax Transcript
- Verification of 2014 earnings up to the date of last employment (including severance pay)

___ 2. **Divorce / Legal Separation (after FAFSA completed)**

___ Student/Spouse ___ Parents

Documents Required:

- A copy of the divorce decree, legal separation agreement, OR a letter from the attorney verifying the separation date.
- Rent receipts / mortgage statements showing separate households.
- 2013 W-2 Forms and 2013 IRS Federal Tax Transcript for student and supporting parent (if dependent student)
- Completed Estimated Income Table for 2014 (on reverse side)

___ 3. **Death of parent or spouse (after FAFSA was completed)**

Relationship to student: ___ Mother ___ Father ___ Spouse

Documents Required:

- A copy of the death certificate.
- 2013 W-2 Forms and 2013 IRS Federal Tax Transcript for student and supporting parent (if dependent student)

4. **Unusual Medical/Dental Expenses**

Documents Required:

- Copy of 2013 Federal Tax Transcript
- Copy of Schedule A from Federal Tax Return showing itemized medical/dental expenses.
- Statements from medical providers showing amounts **paid** by parents/student in 2013

 5. **Disability of parent, student or spouse** Student Mother Father Spouse

Documents Required:

- A letter from the Physician stating the date of the disability and documents supporting social security disability benefits expected to be received in 2014. (SSI)
- Completed Estimated Income Table for 2014 (at bottom of form).

 6. **Loss of benefits and/or untaxed income**

Documents Required:

- Documentation certifying loss of a benefit or untaxed income.
- Social Security: Provide Social Security Administration Notification of Termination of Benefits.
- Child Support: Provide court document stating termination of benefits.
- Worker's Compensation: Provide a letter from Bureau of Worker's Compensation stating termination date of benefits.
- If child support and/or alimony, a copy of divorce decree to include settlement agreement.

ESTIMATED INCOME FOR 2014 CALENDAR YEAR

If you are divorced or separated, include only your income information. If your parents are divorced or separated, include only your custodial parent's income information. If your custodial parent has remarried include their spouse's information. If the loss of income is due to the death of your spouse/parent, include only your income information/surviving parent's income information.

Note: Write in Zero (0) if an item does not apply.	(1/1/2014 - 12/31/2014)			
	Father	Mother	Student	Spouse
<u>Taxable</u> Wages, Salaries, Tips				
State Unemployment Benefits				
Pensions				
Alimony				
Other Taxable Income: Specify Source(s)				
<u>Untaxable</u> Social Security Benefits				
Aid to Families with Dependent Children (AFDC)				
Child Support Received				
Other Untaxed Income Benefits				
TOTAL Anticipated Income				
Cash and Savings				