

## OFFICE OF FINANCIAL AID AND VETERANS AFFAIRS

### 2026–2027 Special Circumstances Appeal for **Independent Students**

#### What is a Special Circumstance Appeal?

A **special circumstance appeal** is a request for the Financial Aid Office to **take another look at your financial aid** if your current financial situation is different from what's shown on your 2026-2027 FAFSA.

The 2026-2027 FAFSA uses income information from the 2024 tax return for you and your spouse (if applicable), but sometimes life changes. If you or your spouse have had unusual or unexpected financial changes, you may ask the financial aid office to review your or your spouse's situation.

Note: Approval is **not automatic** and documentation is required. If approved, our office may be able to **update certain FAFSA information**, which *could* change your financial aid eligibility.

#### Examples of Special Circumstances (This is not an exhaustive list)

- Loss of employment or reduced work hours
- Divorce or separation
- Death of a spouse
- High medical expenses not covered by insurance
- Loss of income or benefits
- Other significant financial changes

#### Section A – Student Information

Student First Name: \_\_\_\_\_

Student Last Name: \_\_\_\_\_

Student ID Number: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip Code: \_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_

Evening Phone Number: \_\_\_\_\_

Buccaneer Email (All communication will be sent to your Buccaneer email):

\_\_\_\_\_

**Section B – Reason for Appeal (Select all that apply)**

Significant reduction in income

Separation, divorce, or death of spouse after FAFSA submission

Involuntary loss of employment

Loss of taxed income or benefits

Retirement

Loss of untaxed income or benefits

One-time income

Unusual medical expenses not covered by insurance

**Section C – Required Documentation for All Appeals:**

- **A written and signed personal statement explaining your situation including dates and income changes.** A written and signed personal statement explaining in full detail your special circumstance situation. This letter MUST be specific with income information from the tax/calendar year that you are asking the financial aid office to review. Be sure that your letter includes dates and sources of income, and an explanation of when and why you and/or your spouse's income changed from 2024.
- **A signed copy of your and/or your spouse's (if applicable) 2024 Federal Income Tax Return Transcript, ALL 2024 W2's.** Please note, if you were selected for verification in the 2026-2027 award year, and have already submitted all required documents for the 2024 tax year along with the 2026-2027 Independent Verification Worksheet, you do not have to resubmit unless requested.
- **Complete the 2026-2027 Independent Verification Worksheet.** If you were previously selected for verification and have submitted a 2026-2027 Independent Verification Worksheet already, you do not have to resubmit another unless requested to do so by our financial aid office.

**Section D – Documentation Based on Appeal Type**

Based on the "Reason for Appeal" you selected above, please submit ALL required information listed.

*(Example: If you checked "Loss of Employment" you will need to submit all documentation listed under that heading and you will do this for each reason you checked.)*

**1. Significant Reduction in Income**

- a) Provide a copy of you and/or your spouse's (if applicable) IRS 2025 tax return transcript.

**2. Involuntary Loss of Employment for you and/or your spouse (if applicable) in 2026 (projected year income).** For 2026 projected year income, do not submit this form prior to 7/1/2026.

- a) Copy of notice of separation from the employer showing your employment status, date of termination, or reduced hours, year to date gross earnings, and amount of severance benefits, if received.

- b) Provide you or your spouse's last paystub received from all positions held in 2026.
- c) Documents related to unemployment benefits, including eligibility statement, and most recent unemployment paystub.

### 3. Retirement

- a) Provide a copy of all retirement benefits received for the year being reviewed.

- 1) Year being reviewed (select one):

2024

2025

The year selected should coincide with the year being reviewed. If you are submitting retirement documentation for the 2025 tax year, signed copies of you and/or your spouse's (if applicable) 2025 Federal 1040 form must also be provided.

### 4. Loss of Taxable Income or Benefits in 2025 or 2026. (Example: Loss of taxable unemployment benefits or taxable social security benefits.)

- a) Provide documentation showing the loss of taxable income or benefits.

- 1) Year being reviewed (select one):

2025

2026

For 2026 projected year income, do not submit this form prior to 7/1/2026.

- b) Provide a copy of the termination notice from the granting agency/company, court order, or documentation from a caseworker.

### 5. Loss of Untaxable Income or Benefits in 2025 or 2026. (Example: Loss of child support or loss of public assistance.)

- a) Provide documentation showing the loss of untaxable income or benefits.

- 1) Year being reviewed (select one):

2025

2026

For 2026 projected year income, do not submit this form prior to 7/1/2026.

- b) Provide a copy of the termination notice from the granting agency/company, court order, or documentation from a caseworker.

**6. One-Time Income (Student and/or spouse) in 2024 or 2025:**

a) Provide documentation from an employer, court, or social agency to support your written statement.

1) Year income was received (select one):

2024

2025

b) If rollover into an IRA, include a statement from the investment company that indicates the amount converted to an IRA.

**7. Separation, Divorce, or Death of a Spouse Submit the Following:**

a) Copy of your and your spouse's 2024 W-2 forms.

b) Photocopy of death certificate in the case of the death of a spouse.

c) Copy of legal separation papers or divorce decree.

d) If no legal separation exists, provide evidence of separate living accommodations such as driver's licenses, rental/lease agreements, mortgage papers, utility bills, etc., showing separate addresses.

**8. Unusual Medical Expenses Not Covered by Insurance Submit the Following:**

a) Statement from physician that documents an unusual medical condition or disability.

b) Copies of receipts or cancelled checks must accompany billing statements for all appropriate bills, billing statement must clearly indicate portions that have been paid by your insurance company or other agency.

**Section E – Certification**

To the best of my knowledge, I certify that the information in the appeal and the documentation that I have submitted is accurate. I understand that misrepresentation of facts in connection with this appeal, whenever discovered, may be sufficient cause, in and of itself, for cancellations and repayments of my financial aid.

Student Signature: \_\_\_\_\_

Date (MM/DD/YYYY): \_\_\_\_\_