

Appeal for Special Circumstance Policy

Appeal Policy:

Your eligibility for financial aid was initially calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). Using this information all families undergo a consistent evaluation of the family's ability to pay for college. The formula assumes that 2016 income is a good indicator of the family's financial strength during the student's 2018-2019 enrollment.

Student Financial Services at Marietta College recognizes that families experience changes in income or other family circumstances that are not reflected in the 2016 tax return information. Therefore it is possible for students to appeal their financial aid eligibility if they have special financial circumstances.

Examples of Special Circumstances considered:

- Reduction of income or benefits in 2018.
- Extraordinary medical or dental expenses in 2016.
- Death of a parent or spouse whose information is on the FAFSA form.
- Divorce or separation after filing the 2018-2019 FAFSA form.
- Natural Disaster expenses not covered by Insurance

Examples of Special Circumstances not considered:

- Home repairs
- Private school tuition
- Credit card debt
- Mortgage payments
- Weddings and other major purchases
- Car payments
- Previous educational loan debt

Please remember, granting appeals is based on a one-time special circumstance. It also depends on the availability of funds and the timeliness of your FAFSA. Submitting this form does not guarantee an adjustment or increase in your financial aid. In the event that we are not able to offer additional financial aid please review the alternative financing options and payment plans available to help finance your education. Information regarding loans is available on our website at <http://www.marietta.edu/tuition-financial-aid>. The interest free payment plan is available and information is located at <http://www.marietta.edu/payment-options>.

Appeals are reviewed within 30 days after receipt of all required and supporting documentation. However, response times may vary depending on volume of appeals at the time of your request.

✦ If you determine that your 2018 income will be the same or higher than 2016's do not complete this form.

✦ Please do not disregard your Marietta College bill due date while waiting for the appeal decision. ✦

Office of Student Financial Services

2018-2019

Marietta College

215 Fifth Street

Marietta, OH 45750

Phone: 1-800-331-2709

Fax: 740-376-4990

Web: <http://www.marietta.edu/tuition-financial-aid>

Email: finaid@marietta.edu

Appeal for Special Circumstance Form

Name: _____ Student ID: _____
Last, First MI

Email: _____ Telephone Number: () _____ - _____

A. Did you file a financial aid appeal during the 2017-2018 Academic Year? YES No

B. Appeal Categories and Supporting Documentation:

Carefully read and select the categories from the following list that most closely describe your special circumstance(s) and provide all supporting documents. Incomplete appeals will not be considered after 60 days.

★ **2016 Federal Tax Return Transcripts are REQUIRED, unless the IRS Data Retrieval Tool was used, for all Appeals for Special Circumstance.** ★

| Type of appeal (check all that apply) | Documentation to include with appeal |
|---|--|
| <input type="checkbox"/> Decrease in student/spouse income from employment in 2018 of at least 8 weeks. | <ul style="list-style-type: none"> • Statement documenting retirement benefits for 2018. • Letter from employer documenting employment status (e.g. full-time to part-time or termination). • Unemployment Benefits statement. • Last pay stub after separation from job. If after January 1st, 2019, please submit copies of 2018 W-2s. • Copies of statements indicating severance pay. |
| <input type="checkbox"/> Decrease in parent income from employment in 2018 of at least 8 weeks. | <ul style="list-style-type: none"> • Statement documenting retirement benefits for 2018. • Letter from employer documenting employment status (e.g. full-time to part-time or termination). • Unemployment Benefits statement. • Last pay stub after separation from job. If after January 1st, 2019, please submit copies of 2018 W-2s. • Copies of statements indicating severance pay. |
| <input type="checkbox"/> Unreimbursed medical or dental expenses paid in 2016. Must exceed 11.5% of AGI. | <ul style="list-style-type: none"> • Provide a summary of PAID unreimbursed expenses (deductibles, co-pays, after tax insurance, prescription medications, expenses for durable medical equipment, and other amounts not covered by insurance) for 2016. • Cobra payments made in 2017. • *Elective cosmetic or dental expenses will not be considered.* |
| <input type="checkbox"/> Death of immediate family member whose information is on the FAFSA. | <ul style="list-style-type: none"> • Provide copies of 2016 W-2 forms. • Provide copy of Death Certificate |
| <input type="checkbox"/> Divorce or separation after filing the 2018-2019 FAFSA. | <ul style="list-style-type: none"> • Complete copy of divorce decree or complete copy of separation agreement. If no legal separation documentation exists, provide a statement indicating the date of the separation. • Provide documentation for <u>both parents'</u> living expenses at different addresses (e.g.: rental agreement, lease or mortgage statement and utility bills). • Provide agreement of financial support payments (e.g. alimony, spousal support, child support or dependent care). • List the number of family members currently in the household. • Copies of 2016 W-2 forms. |
| <input type="checkbox"/> Natural Disaster Expenses not covered by Insurance | <ul style="list-style-type: none"> • Copies of all expenses regarding natural disaster. • Copies of what is covered by insurance. |

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Marietta College

Office of Student Financial Services
2018- 2019

Student ID: _____

C. Income Information For 2018:

The following section requires you to provide your actual and expected 2018 income. Do not put hourly wage. Instead, please compute the full amount you have or will receive.

| Expected 2018 Income | Student | Spouse | Father/ Stepfather | Mother/ Stepmother | Documents Required |
|---|---------|--------|-----------------------|-----------------------|--|
| Gross Income EARNED from work: 1/1/2018 through present date | \$ | \$ | \$ | \$ | Current or Final Pay Stub |
| Gross Income TO BE EARNED from work: present date through 12/31/2018 | \$ | \$ | \$ | \$ | Current Pay Stub |
| Severance Pay | \$ | \$ | \$ | \$ | Letter from Company |
| Unemployment Benefits | \$ | \$ | \$ | \$ | Documentation from Agency |
| Workman's Comp Benefits | \$ | \$ | \$ | \$ | Documentation from Agency |
| Pension Distributions | \$ | \$ | \$ | \$ | Pension Statement |
| Business Income | \$ | \$ | \$ | \$ | Letter from Accountant or Quarterly Statement |
| Alimony | \$ | \$ | \$ | \$ | Letter from Court |
| Child Support Received | \$ | \$ | \$ | \$ | Letter from Court |
| Early Withdrawal from Retirement Funds | \$ | \$ | \$ | \$ | Letter outlining how funds were used |
| Total Expected 2018 Income: | \$ | \$ | \$ | \$ | |

*Do not include the value of on-base military housing or the value of a basic military allowance for housing.

