

Special Circumstance Appeal Form 2009-2010



Name: _____ Spire ID: _____
Last First M
 Telephone Number: (____) _____ - _____
 Email: _____ Cell Phone Number: (____) _____ - _____

A. Appeal Information :

The University of Massachusetts Amherst makes its best offer of financial aid in the initial award letter. This is part of our continued effort to work in partnership with students and their families to finance a university education. Requests for additional financial aid should be based on special circumstances not reflected on your Free Application for Federal Student Aid (FAFSA). Examples of special circumstances include: divorce, medical or dental expenses, reduced income, or the death of a parent or spouse. Appeals will be granted based on the availability of funds and the timeliness of your FAFSA. Please note: if the student has not accepted the loans offered in the initial award letter, this appeal will not be considered. Home repairs, private school education, credit card debt, mortgage payments, weddings, and major purchases will also not be considered.

B. Reasons for Appeal:

- ✓ Check all that apply
- Decrease in student/spouse income in 2009 of at least 8 weeks.
- Decrease in parent income in 2009 of at least 8 weeks.
- Unreimbursed medical or dental expenses for 2008
- Death of spouse or parent*
- Divorce or separation after filing the 2009-2010 FAFSA form**

*If the loss of income is due to the death of your spouse or parent, provide only information about yourself or your surviving parent.

** If the loss of income is due to divorce or separation, provide only information about yourself or your custodial parent.

C. Income Information:

January 1, 2009 through December 31, 2009	Student	Spouse	Parent(1)	Parent(2)
Wages, salaries, tips	\$	\$	\$	\$
Unemployment Benefits	\$	\$	\$	\$
Severance pay	\$	\$	\$	\$
Cash assistance from family or friends	\$	\$	\$	\$
Child support for all children	\$	\$	\$	\$
Total anticipated income for 2009	\$	\$	\$	\$

D. Please explain below what has caused the changes in your family's circumstances (attach a separate sheet if needed). Remember to write your name and Spire ID on each page.

Please be aware that verification is required as part of this appeal. A complete 2009-2010 Verification Worksheet and signed copies of 2008 Federal tax returns for you, your parent(s) or spouse (if student is married) will be required.

The Verification Worksheet is available for download at our website: www.umass.edu/umfa/forms/.

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Financial Aid Services | 255 Whitmore Administration Building | 181 President's Drive | Amherst | MA | 01003-9313 | Telephone 413.545.0801 | TDD 413.545.9420 | Fax 413.545.1700

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E. Documentation Requirement:

Please include with all appeals:

* A completed 2009-2010 Verification Worksheet and

* Signed copies of 2008 Federal tax return and W-2's for the student, parent or spouse (if student is married).

Remember to write your Spire ID on all supporting documentation.

Type of Appeal	Documentation to Include with Appeal
Decrease in student/spouse income from employment in 2009.	Statement of anticipated income from January 1, 2009 though December 31, 2009. Statement documenting retirement benefits for 2009. Letter from employer documenting employment status (e.g full-time to part-time or termination). Unemployment Benefits statement. Last pay stub/provide all that apply.
Decrease in parent income from employment in 2009	Statement of anticipated income from January 1, 2009 though December 31, 2009. Statement documenting retirement benefits for 2009. Letter from employer documenting employment status (e.g full-time to part-time or termination) Unemployment Benefits statement. Parents last pay stub after separation from job. Provide all that apply.
Unreimbursed medical or dental expenses for 2008	Provide a summary of unreimbursed expenses (deductibles, co-pays, after tax insurance, premiums and other amounts not covered by insurance, prescription medications and expenses for durable medical equipment). Copies of any large bills. Elective cosmetic or dentistry expenses will not be considered.
Death of spouse or parent	Provide death certificate and payment of funeral expenses not covered by insurance.
Divorce or separation after filing the 2009-2010 FAFSA form	Provide legal documentation supporting divorce or separation. If no legal documentation exists, please provide a statement indicating the date of the divorce or separation. Also provide documentation of living expenses at different addresses. Provide agreement of financial support payments, (e.g. alimony, spousal support, or dependent care). List the number of family members currently in the household Copies of 2008 W-2's.

Please submit completed form with supporting documentation to Financial Aid Services, 255 Whitmore Administration Building no later than:

November 1, 2009- if your appeal is for the Fall 2009 Semester.

April 1, 2010- if your appeal is for the Spring 2010 semester.

You may also fax the completed form and documents to (413) 545-1700.

F. Signature and Certification:

I certify that the information submitted for this appeal is true and complete to the best of my knowledge. I agree to provide all supporting documentation required. I understand that failure to comply may result in the cancellation of this appeal. I further understand that if I have provided information in previous appeals, this information may be reviewed for accuracy and it may impact the outcome of this and or any future appeal.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____
(Required for Dependent Student)

