

2024-2025 Financial Aid Appeal Form

The Financial Aid Office reviews each family's ability to contribute towards educational costs and provides a financial aid package based upon the information reported on the FAFSA, CSS Profile, and submitted tax documents. However, when circumstances arise that can significantly impact a family's ability to contribute, students may request a review of their financial aid eligibility. This can occur due to a change in the family's financial circumstances, new information regarding special or unusual situations the family may be facing, adjustments or corrections to the initial information, or information that has changed significantly from the initial application.

Please note, we will not consider private secondary school tuition, credit card bills, car payments, previous educational loan debt, or other colleges' offers of financial aid.

Instructions

1. Please review the table of reasons to appeal. Select at least one reason and follow the directions for the supporting documentation that should be included with the appeal.
2. In addition to this form, submit any substantiating documentation along with a copy of your 2023 tax returns and W2s once available. Please only submit the following three pages of this form; we do not need this first page.
3. Documentation should be uploaded using the College Board's IDOC document imaging service at <http://idoc.collegeboard.org/>. **Please be sure to let us know once the documentation is uploaded so we know to review it.**
4. Please **DO NOT** email the documentation to our office.

Once all documentation is received, the appeal will be reviewed by our office appeal committee. In the event additional information or documentation is required during the review process, we will reach out. Please know that, while we certainly recognize families can face demanding and intractable circumstances, we are unfortunately unable to respond favorably to every appeal. Appeals are reviewed on a case-by-case basis, and decisions depend on availability of funding, among other variables.

Response time will vary based on our appeal volume at the time the request is received. All decisions will be communicated in writing, and if changes are made to the financial aid offer, the student will receive a revised notification. Appeal committee decisions are final.

****** Please keep this page for your records ******

2024-2025 Financial Aid Appeal Form

Name of Student (Last, First, MI)

Graduation Year

College Board FinAid ID

Section 1: Appeal Circumstances

Please check the box(es) below that most accurately describes your situation. You may check more than one if appropriate. Please note any supporting documentation that is required and please upload to IDOC. Detailed explanations of circumstances should be attached separately. Please note the appeals committee may request additional documentation from what is listed in order to properly assess the appeal

Please check off reason(s) or Appeal	Reason For Appeal	Required Documentation
	Significant loss income due to termination or change in employment. *Changes may not be considered if income loss for the year does not further demonstrate financial need Please list date of unemployment/termination of benefits date:	Termination or change of employment: <ul style="list-style-type: none"> • Copy of the last/most recent pay stub for both parents in the household • Termination notice or letter of explanation from employer • Severance statement • Copy of unemployment benefit eligibility Termination or reduction to untaxed benefits, including Social Security, child support, disability: <ul style="list-style-type: none"> • Documentation of reduction • Explanation for change from granting authority
	Unexpected Life Event *Please note that in a divorce situation, we will continue to consider both custodial and noncustodial parents' income and asset information	Death of parent or other immediate family member: <ul style="list-style-type: none"> • Documentation of medical and/or funeral expenses • Documentation of expected Social Security benefits for all family members • Documentation of other distributions from inheritance, assets, or other benefit sources including life insurance
	Correction to income or asset information reported	<ul style="list-style-type: none"> • Complete the Asset Clarification form if reporting error in asset information • If there was error in family size, complete the Dependent Verification form • Detailed description of error and correction; documentation of correct amount (for example, if mortgage value and debt was misreported, a copy of the mortgage statement and most recent assessment of home should be sent)
	Cost of siblings' undergraduate college *Federal funding consideration only*	<ul style="list-style-type: none"> • Documentation showing cost of undergraduate college (financial aid notification, cost of attendance information for academic year from institution) • Dependent Verification form
	One-time capital gain or distribution	Please provide details. Please note that both the circumstances and the capital gain/distribution must be one-time occurrences, which did NOT occur in 2021, and are not expected again in 2023.
	High medical/dental expenses	Documentation of medical bills paid during prior tax year. If there is an ongoing condition, please provide documentation and/or estimate of treatment costs NOTE: Explanation of Benefits from insurance provider is not acceptable documentation
	Other reason not listed	Please provide a detailed description of the basis of appeal and documentation supporting your request for reconsideration NOTE: we are unable to consider appeals based on circumstances that include but are not limited to: <ul style="list-style-type: none"> • High consumer debt • Private secondary school tuition • Personal Expenses (pets, cars, housekeepers, vacations, sports, etc.) • Expenses that have not yet occurred or paid

Section 2: Estimated Year Income

Note: If you have already completed your 2023 taxes, please skip this section and upload your tax documentation to IDOC.

2023 Gross Taxable Income	Parent 1 Income	Parent 2 Income
Wages, salaries, tips		
Severance pay		
IRA/pension/annuity distribution		
Interest and dividend income		
Business or farm income		
Income received from rents after expenses paid by mortgage, taxes, and insurance		
Capital gains		
Unemployment compensation		
Any other taxable income		
Total 2023 gross taxable income		

2023 Gross Untaxed Income	Parent 1 Income	Parent 2 Income
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings). Includes untaxed portion of 401(K) and 403(B) plans		
Social Security benefits (SSI or disability) received by the parents plus the benefits received for the student and other children		
Retirement or disability benefits		
Worker's compensation		
Welfare benefits, including AFDC		
Untaxed portion of IRA/pension/annuity		
Living and housing allowances (excluding rent subsidies for low income housing) for clergy, military, and others (including cash payments or cash value of benefits)		
Child support or maintenance payments which will be received for the student and other children (including cash support or money paid on student's behalf from non-custodial parent) ***		
VA benefits, excluding educational benefits received by the student		

Railroad retirement benefits		
Job Training Partnership Act (JTPA) non-educational benefits		
Any other untaxed income and benefits such as alimony, Black Lung Benefits, refugee assistance, etc.		
Total 2023 gross untaxed income		

***Please also indicate the amount of child support payments received for the student and other children in 2024:

Section 3: Signatures

I/We hereby swear or affirm that the information reported on this form is true, complete, and accurate to the best of my/our knowledge. I/We understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid.

I/We also acknowledge that any decision made using these numbers will be based on estimated 2023 figures. I/We will submit the 2023 tax returns and W2s once they are ready, and if there are significant discrepancies between the estimated figures and the tax returns, the financial aid package will be adjusted accordingly.

Student Signature

Date

Parent Signature

Date