**2023-2024 Appeal for Special Financial Consideration**

***Deadline for returning this form is April 1, 2024***

We understand that sometimes there are special financial circumstances that are not reflected on your FAFSA and do not accurately show your current financial situation. It may be possible to take these circumstances into account, when appropriate and sufficient third party documentation is provided, through a process called Professional Judgement (PJ). The Financial Aid Office will carefully review your appeal within 30 days of receipt of all required information and you will be notified of the decision in writing. Please be aware that, even though this appeal may lower your Expected Family Contribution (EFC), it may not result in additional financial aid.

**Supply the following for all requests:**

1. Completed 2023-2024 Appeal for Special Financial Consideration form
2. Attach a detailed but concise statement of the circumstances leading to the request (who, why, when)
3. Completed 2023-24 Verification Worksheet (available at: <http://rocky.edu/admissions/financial-aid-scholarships/Forms.php>)
4. 2021 and 2022 IRS Tax Return Transcripts for your parent(s) if dependent and/or yourself (and your spouse if married)
5. All documentation pertaining to each specific circumstance checked below

**Income will be significantly less than what is reported on the FAFSA due to (check all that apply):**

**1.\_\_\_\_**­­ Involuntary reduction in parent, student, or spouse employment in 2022 or unemployment for at least 10 weeks in 2023. As a general rule, the projected income should be at least 20% less than 2021 income before submitting documentation.

* If 2022 income will be used: signed copy of the 2022 IRS Tax Return
* If 2023 income will be used: a copy of the last pay stub;
* Letter from previous employer indicating last day of employment;
* Copy of unemployment letter indicating monthly unemployment compensation, and
* Complete the worksheet on the reverse side of this form estimating your 2022 income

**2.\_\_\_\_** Loss of untaxed income such as Child Support, Worker’s Compensation, etc. for at least 10 weeks.

* Written statement from appropriate agency showing loss of benefit and termination date

**3.\_\_\_\_** Death of parent or spouse after submission of your 2023-24 FAFSA

* Copy of death certificate or obituary
* Copies of all parent or student and spouse 2021 W-2s

**4.\_\_\_\_** Divorce or legal separation after submission of your 2032-24 FAFSA

* Copy of divorce decree or proof of separation (e.g. court order, statement from attorney or clergy)
* Documentation of expected child and/or spousal support payments

**5.\_\_\_\_** Unusual or excessive medical, dental, vision, prescription expenses paid in 2021 or 2022 that exceeds 10% of the adjusted gross income reported on the federal income tax return. Only one year’s expenses can be considered. Expenses must be paid out-of-pocket (not covered by insurance, or a FSA or a HSA account). Elective cosmetic or elective dental expenses are not considered.

* Enclose receipts and detailed listing of expenses already paid in 2021 or 2022. Please total all items.
* Schedule A from 2021 or 2022 federal income tax returns

**6.\_\_\_\_** Private tuition expenses at an elementary or secondary school for other children in the household during the 2023-2024

 academic year.

* Enclose an official tuition statement/invoice reflecting actual charges paid/due for the 2023-24 academic year reflecting financial aid awarded along with documentation of tuition payments paid for each student.

**7.\_\_\_\_** Atypical one-time taxable income such as a capital gain, 401K disbursement, or moving expenses reflected on a 2021 federal

income tax return. Lottery, gambling, bonus, or overtime income will not be considered.

* Statement indicating nature of earnings
* Documentation to show what the funds were used for. Lifestyle choice costs (e.g. vacations) are not considered.
* 1099-R or statement showing amount received

**Continued on next page**

**Expected 2023 Income: C**omplete this section if you checked #1 on the front of this form. Do your best to estimate income expected from January 1, 2023 through December 31, 2023. If you did not check #1, skip this section and sign and date the form below.

* **Attach documentation (e.g. current pay stubs, unemployment letter, etc.) to support each amount reported below.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2023 expected annual income | Father(if student is dependent) |  Mother(if student is dependent) | Student(if student is independent) | Spouse(if student is married) |
| TAXABLE INCOME |  |  |  |  |
| Income Earned From Work | $ | $ | $ | $ |
| Unemployment compensation | $ | $ | $ | $ |
| Severance Pay | $ | $ | $ | $ |
| Business, Farm, or Rental Income | $ | $ | $ | $ |
| Dividends, Interest, Capital Gains, etc. | $ | $ | $ | $ |
| Taxed Withdrawal from Retirement Acct | $ | $ | $ | $ |
| Other (specify) | $ | $ | $ | $ |
|  | $ | $ | $ | $ |
|  | $ | $ | $ | $ |
| UNTAXED INCOME |  |  |  |  |
| Child Support | $ | $ | $ | $ |
| Workers’ Compensation | $ | $ | $ | $ |
| Disability (not Social Security) | $ | $ | $ | $ |
| Untaxed IRA/Pension Distribution | $ | $ | $ | $ |
| Any other untaxed income (specify) | $ | $ | $ | $ |
|  | $ | $ | $ | $ |
|  | $ | $ | $ | $ |
|  | $ | $ | $ | $ |

**Reminder: Please be sure to submit all required supporting documentation items with this appeal form** (detailed but concise statement of the circumstances, completed 2023-24 Verification Worksheet, 2021 and 2022 signed IRS Tax Returns, all required documentation listed for each item checked)**.** **Missing items will delay processing.**

**Certification and Signatures:**

I/we certify that all information provided by me or any other person on this form is true and complete to the best of my knowledge. I/we understand that this appeal will not be reviewed until all required documentation is submitted and my 2023-24 FAFSA is on file with Rocky Mountain College. I/we understand further documentation may be needed by the Financial Aid Office staff in addition to those listed. Decisions are made on an annual and case-by-case basis. Any PJ decisions are final and apply only to Rocky Mountain College. Please note if you purposely give false or misleading information, you may be fined, imprisoned, or both.

Student Name (please print):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Last, First, MI

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student Signature

Daytime/Cell phone: ( )\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Parent Signature (If student is dependent)

If you have any questions regarding this form please contact the Financial Aid Office at 800.877.6259, ext. 1031 or 406.657.1031. Return this form and all supporting documentation to: Rocky Mountain College Financial Aid Office, 1511 Poly Drive, Billings, MT 59102. Email: finaid@rocky.edu. Fax: 406.657.1189.