



New Paltz
STATE UNIVERSITY OF NEW YORK

Office of Student Financial Services
200 Hawk Drive, New Paltz, NY 12561-2438
Ph: 845-257-3250 • Fax: 845-257-3568

**SPECIAL CIRCUMSTANCES APPEAL
2024-2025**

Student's Name _____

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Student's ID Number

The 2024-2025 FAFSA requires families to provide income information from the 2022 tax year. If there has been a significant change in income since 2022, use this form to request a review of your current income situation. Forms submitted without required documentation will not be considered (see below for specifics).

Please complete and include the following with your appeal:

- **Signed cover letter** that explains your change in circumstances.
- **Household Size Statement (Form E)** based on your student status (dependent or independent student). You can find this form on the Forms page at www.newpaltz.edu/financialaid.

Please indicate who this special circumstance pertains to _____

Student's Phone Number _____

Check all circumstances that apply:

SPECIAL CIRCUMSTANCE	DEFINITION	REQUIRED DOCUMENTATION
<input type="checkbox"/> Loss of income or employment in 2023 (wages/employment, alimony, child support, retirement/pension, taxed social security, worker's compensation.)	Income and/or benefits in 2023 were significantly less than in 2022	<ul style="list-style-type: none"> • Documentation of loss of employment showing begin date and revised benefits statement(s) • Unemployment Benefits Statement • 2022 & 2023 signed Tax Return 1040 with all schedules for student and parent(s) • 2022 & 2023 W-2 wage statements for student and parent(s) • Last paystub showing year-to-date earnings
<input type="checkbox"/> Loss of income or employment in 2024 (wages/employment, alimony, child support, retirement/pension, taxed social security, worker's compensation.)	Projected income and/or benefits in 2024 will be significantly less than in 2023	<ul style="list-style-type: none"> • Documentation of loss of employment showing begin date and revised benefits statement(s) • Unemployment Benefits Statement • 2022 & 2023 signed Tax Return 1040 with all schedules for student and parent(s) • 2022 & 2023 W-2 wage statements for student and parent(s) • Last paystub showing year-to-date earnings
<input type="checkbox"/> Divorce or separation Note: Recent non-legal separations are subject to a six-month waiting period.	FAFSA information does not reflect current marital status or income.	<ul style="list-style-type: none"> • Divorce/separation agreement or attorney letter • Documentation of separate residences • 2022 signed Tax Return 1040 with all schedules for student and parents • 2022 W-2 wage statements for student and parents
<input type="checkbox"/> Death of a parent or spouse	Parent or spouse passed away since filing the FAFSA.	<ul style="list-style-type: none"> • Death Certificate • Amount of any death benefits to be received • 2022 signed Tax Return 1040 and all schedules • 2022 W-2 wage statements for all
<input type="checkbox"/> Medical or dental expenses	Expenses paid out-of-pocket exceeded 11% of 2022 AGI.	<ul style="list-style-type: none"> • 2022 signed Tax Return 1040 with all schedules for student and parent • 2022 W-2 statements for all • Copies of all out-of-pocket paid expenses (not bills) for 2022
<input type="checkbox"/> One-time payment (retirement account withdrawal or retroactive wages.)	A lump sum payment was received in 2022 and will not be received again.	<ul style="list-style-type: none"> • 2022 signed Tax Return 1040 with all schedules for student and parent(s) • Documentation of one-time payment • Letter explaining what the funds were used for and how much remains available

PROJECTED INCOME AND BENEFITS FROM JANUARY 1, 2024 TO DECEMBER 31, 2024

SOURCE OF INCOME	PARENT/STEPPARENT 1	PARENT/STEPPARENT 2	STUDENT	STUDENT'S SPOUSE
Wages, Tips, Salary	\$	\$	\$	\$
Interest and/or Dividend Income	\$	\$	\$	\$
Unemployment Compensation	\$	\$	\$	\$
Worker's Compensation	\$	\$	\$	\$
Pensions and/or Annuities	\$	\$	\$	\$
Severance Pay	\$	\$	\$	\$
Retirement Benefits	\$	\$	\$	\$
Disability Benefits	\$	\$	\$	\$
Social Security Benefits (taxable)	\$	\$	\$	\$
Child Support	\$	\$	\$	\$
Alimony	\$	\$	\$	\$
Other:	\$	\$	\$	\$
TOTAL OF ALL INCOME	\$	\$	\$	\$

Do you plan to take out student loans for the 2024-2025 year? Yes No

STATEMENT OF CLARIFICATION

- All of the information on this form is true and complete to the best of my/our knowledge.
- If requested, I/we agree to provide further documentation to substantiate the information provided.
- I/we understand that all special circumstances are reviewed on a case-by-case basis and this written request may not result in a change to the financial aid already offered.
- I/we understand this form only applies to Federal financial aid and it cannot be used to change state aid programs such as NY State TAP, SUNY Tuition Credit, or NYS Excelsior Scholarship.
- Requests should allow approximately 4 weeks for processing time, and they do not extend the payment deadline for billing purposes.
- Decisions are final and will be communicated to the student.

Student's Signature Date

Student's Spouse's Signature (required if student is married) Date

Parent's Signature (required if student is dependent) Date

HAVE YOU PROVIDED ALL OF THE FOLLOWING?

Signed cover letter & Household Size Statement

Tax Documents, all schedules & W-2 Statements

All other required documentation as indicated

Appropriate signatures on all forms

Student's Name and ID Number on all forms

Return the completed form and requested documentation to us:

Email (Preferred)	FAX	In-Person	Mail
faodocuments@newpaltz.edu	845-257-3568	Wooster Hall 124	Student Financial Services 200 Hawk Drive New Paltz, NY 12561-2437

THE FOLLOWING WILL NOT BE CONSIDERED FOR APPEALS:

- Discretionary personal expenses or consumer indebtedness (i.e., wedding expenses, credit card bills, car payments, etc.)
- Bankruptcy
- Home equity, 401k, or 403b loans
- Voluntary unemployment or relocation
- Lottery/gambling winnings
- Tuition paid for elementary or secondary school
- Repeated retirement account withdrawals