

**SPECIAL CONDITION FINANCIAL AID APPLICATION
FOR STUDENTS 2021-2022 Academic Year**

Please check one of the following: Continuing Student New Student

_____/_____/_____
Student's Last Name / First M.I. Royal ID #

If your family's projected 2021 income will be significantly less than the 2019 tax data provided on the 2021-2022 FAFSA, you may complete this form and return it to address listed on side 2 for further consideration of your 2021-2022 financial aid. If you have questions concerning this matter, please contact the Financial Aid Office at (570) 941-7701. If you are unable to estimate the total income your family will receive from January 1, 2021 until December 31, 2021, at this time, keep this form until you can provide an accurate estimate. If the form is submitted after October 31, 2021, a copy of the 2021 tax return may be required.

University of Scranton requires W-2 Forms, Household Size Form, and may require third party verification of your financial changes. If Data Retrieval Tool was not used on the FAFSA, a signed copy of your 2019 federal tax return or paper copy of 2019 IRS Return Transcripts will be required. Additional documents may be requested after initial review. If you have an interest in a corporation and/or partnership, you also need to submit copies of the most recent U.S. Partnership and/or Corporation Tax Return(s), including the completed balance sheet(s) and K-1 schedule(s). If you do not submit ALL of the requested 2019 tax documents, University of Scranton will be unable to give further consideration to your request for reduced income processing.

Please review the sections below and indicate which explanation(s) applies to the reason(s) your family's 2021 income will be reduced.

A. Death of Spouse (death must have occurred AFTER original FAFSA was filed).

Date: _____ (Month/Day/Year)

B. Permanent and total (unable to work again) disability of you and/or spouse (must have occurred ON OR AFTER January 1, 2020).

Date: _____ (Month/Day/Year)

C. Student and/or spouse has retired, has been or will be unemployed, or has experienced a change in employment status which will result in an income reduction ON OR AFTER January 1, 2020.

Student Occurrence Date: _____ Spouse Occurrence Date: _____
(Month/Day/Year) (Month/Day/Year)

D. Sources of taxed or untaxed income, as reportable on the Free Application for Federal Student Aid (FAFSA), has ceased or been reduced; include business loss(es) here.

Occurrence Date: _____ (Month/Day/Year)

E. Separation/divorce AFTER original FAFSA was filed:

Occurrence Date: _____ (Month/Day/Year)

F. Other

Occurrence Date: _____ (Month/Day/Year)

COMPLETION REQUIRED: YOU MUST PROVIDE AN EXPLANATION DETAILING ALL REASONS AND DATE(S) YOUR FAMILY'S 2021 INCOME WILL BE SIGNIFICANTLY REDUCED AND COMPLETE THE REST OF THE FORM. FAILURE TO PROPERLY COMPLETE THIS QUESTION WILL RESULT IN THE FORM BEING RETURNED TO YOU.

Royal ID # _____

G. Complete both of the sections (Gross Taxed and Untaxed) below with income (prior to exemptions, adjustments or deductions) you and/or your family expects to receive from January 1, 2021 until December 31, 2021. **DO NOT LEAVE BLANKS; IF NONE, ENTER ZERO.** Please do not give monthly amounts. IF YOU DO NOT COMPLETE THIS FORM IN ITS ENTIRETY OR DO NOT PROVIDE THE REQUESTED 2019 TAX DOCUMENTS, THE FINANCIAL AID OFFICE WILL BE UNABLE TO GIVE FURTHER CONSIDERATION TO YOUR REQUEST FOR REDUCED INCOME PROCESSING.

TOTAL EXPECTED 2021 GROSS TAXED INCOME

	Student's Yearly <u>Taxed Income</u>	Spouse's Yearly <u>Taxed Income</u>
1. Wages, salaries, tips	\$ _____	\$ _____
2. Severance pay	\$ _____	\$ _____
3. Taxable portions of pensions, annuities, 401(K), and/or IRA Distributions	\$ _____	\$ _____
4. Taxable portions of interest and dividend income	\$ _____	\$ _____
5. Business or farm income	\$ _____	\$ _____
6. Capital gains	\$ _____	\$ _____
7. Net Income received from rents after expenses paid for mortgage interest, taxes, and insurance	\$ _____	\$ _____
8. Alimony which will be received	\$ _____	\$ _____
9. Unemployment Compensation (State and/or SUB)	\$ _____	\$ _____
10. Taxable portions of all Social Security benefits received	\$ _____	\$ _____
11. Any other taxed income	\$ _____	\$ _____
Total 2021 <u>Gross Taxed Income</u>	\$ _____	\$ _____

TOTAL EXPECTED 2021 UNTAXED INCOME

	Student's Yearly <u>Untaxed Income</u>	Spouse's Yearly <u>Untaxed Income</u>
1. Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts which would be reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S.	\$ _____	\$ _____
2. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans	\$ _____	\$ _____
3. Child support received for all children	\$ _____	\$ _____
4. Tax exempt interest income	\$ _____	\$ _____
5. Untaxed portions of IRA distributions	\$ _____	\$ _____
6. Untaxed portions of pensions	\$ _____	\$ _____
7. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$ _____	\$ _____
8. Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensations (DIC) and/or VA Educational Work-Study allowances	\$ _____	\$ _____
9. Other untaxed income not reported elsewhere, such as workers compensation, disability, etc.	\$ _____	\$ _____
10. Money received, or paid on your family's behalf (e.g., bills, living/college expenses, etc.) not reported elsewhere on this form	\$ _____	\$ _____
Total 2021 <u>Untaxed Income</u>	\$ _____	\$ _____

NOTE: YOU MUST NOTIFY FINANCIAL AID OFFICE AT THE UNIVERSITY OF SCRANTON IMMEDIATELY OF ANY INCREASE IN YOUR INITIAL 2021 INCOME ESTIMATE. FAILURE TO IMMEDIATELY NOTIFY THE UNIVERSITY OF SCRANTON OF ANY INCREASE TO YOUR FAMILY'S INCOME MAY RESULT IN CANCELATION OF NEED BASED GRANTS FOR WHICH YOU OR OTHER MEMBERS OF YOUR FAMILY WERE NOT ENTITLED.

Signature of Student _____ Date _____

Signature of Spouse _____ Date _____

Please provide Student's daytime telephone number: _____

Return completed form along with supporting documentation, including W-2 form(s) & 2021-21 Household Size Form to:
The University of Scranton, Financial Aid Office, 800 Linden Street, Scranton, PA 18510-4689 or Fax: 570-941-4370
DO NOT EMAIL