

2023-2024 Evaluation for Special Circumstances

If you or your family has **unusual circumstances** that might affect your ability to pay for college, the GSEP Office of Financial Aid may take this information into consideration. Please note that completion and submission of this form do not guarantee that the financial aid applicant will be eligible for additional aid.

***Federal law prohibits colleges from making changes unless they are clearly documented and supported.
 Do not submit this form without attaching the requested documentation.***

- ◆ Please read and follow the instructions carefully.
- ◆ Complete the 2023-2024 Anticipated Income Form (on reverse side) and make a copy for your records.
- ◆ Provide a **DETAILED LETTER** that describes the change in household income and circumstances that caused the decrease in income. In addition, you must provide the following documentation to support the appeal.

CONDITION

DOCUMENTATION

- | | |
|---|--|
| 1. Death of a spouse | Copy of the death certificate and your 2022 W-2s or documentation of non-taxable income. |
| 2. Non-Recurring or “One-time” Income | For Pension distribution: 2022 Federal income tax return transcript (instructions on the next page), Schedule D and 1099. For other “one-time” income, please provide documentation from either provider or the payment. |
| 3. Other Income Reduction of 20% or greater | <ul style="list-style-type: none"> - A copy of your last 2 pay stubs showing cumulative earnings to date. - 2022 Federal Tax Return Transcript (instructions at the end of the form) or a signed copy of your 2022 federal tax return. - For child support/alimony reduction: final divorce agreement. - For decreased benefits (Social Security Benefits, AFDC, etc.), please provide a statement from the agency stating decrease in amount. - For loss from natural disaster, please provide documentation from the insurance company, if available. - For loss of business or farm due to bankruptcy or foreclosure, please provide legal documentation. |
| 4. Unemployment | Unemployment Insurance information from the Employment Development Department (EDD), a copy of separation letter from previous employer, and a copy of last pay stub showing cumulative earnings to date. A copy of 2 pay stubs from your new employer. |
| 5. Unreimbursed medical/dental expenses: that exceed 15% of income. | List expenses and provide documentation for each expense. |

INSTRUCTIONS TO REQUEST 2022 TAX RETURN TRANSCRIPTS OR PROOF OF NON- FILING

A 2022 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by Mail** - Go to www.IRS.gov, click “Get Your Tax Record.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.” The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
 - **Get Transcript ONLINE** - Go to www.IRS.gov, click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
 - **Automated Telephone Request** – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
 - **Paper Request Form** – Use the links to download IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- In most cases, for electronic tax return filers, 2022 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2022 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2022 paper IRS income tax returns, the 2022 IRS income tax information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2022 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

please complete the form on the next page...

2023-2024 ANTICIPATED INCOME

Student's Name: _____ Campuswide ID #: _____

1. Please check appropriate reason and provide the effective date:

- Death of a spouse (Attach documentation)
- Non-recurring income (Attach documentation)
- Other income reduction (Attach documentation)
- Unemployment (Attach documentation)
- Unreimbursed medical expenses (Attach documentation. Do not complete #2)

Effective Date of Change: _____

2. Please list all sources of income you anticipate receiving for the 2023 calendar year.

Taxable Income

- a. Employment Income \$ _____
- b. Unemployment Benefits \$ _____
- c. Retirement Benefits \$ _____
- d. Severance Pay \$ _____
- e. Alimony \$ _____
- f. Business Income \$ _____
- g. Rental Income \$ _____
- h. Farm Income \$ _____
- i. Interest/Dividend Income \$ _____

Total Taxed Income \$ _____

Untaxed Income

- a. AFDC \$ _____
- b. Social Security Benefits \$ _____
- c. Payments to tax-deferred pension and savings plan \$ _____
- d. Disability Benefits \$ _____
- e. Workers Compensation \$ _____
- f. Child Support \$ _____
- g. Other _____ \$ _____

Total Untaxed Income \$ _____

Total Anticipated Income (Untaxed + Taxed Income) \$ _____

The attached information represents all anticipated sources of income for the 2023 calendar year. I agree to provide any additional information requested by the GSEP Financial Aid Office to support the above estimates. I further understand that I must notify the Financial Aid Office of any further financial changes. I understand that discrepancies between actual and estimated information may result in an adjustment of my financial aid awards.

Student's Signature

Date

For Office Use Only:

F.A. Administrator: _____ Date: _____ Decision: _____