



Office of Student Financial Aid
802 Grand Avenue
Glenwood Springs, CO 81601
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SPECIAL CIRCUMSTANCES INCOME APPEAL

The purpose of this form is to appeal the use of 2015 income information for financial aid purposes.
2017-2018

Student Name _____ Student ID _____

Mailing Address _____

CMC Email Address: _____@mail.coloradomtn.edu

You will be contacted via your CMC student email if any further information is required

If you have unusual circumstances that prevent information reported on your Federal Application for Federal Student Aid (FAFSA) from reflecting your true circumstances and ability to pay for higher education expenses for yourself, your dependent student, or your spouse, please complete this form and return to the financial aid office (fax 970-947-8318.) If you are an independent student, you must submit information pertaining to yourself and your spouse. If you are a dependent student, you must submit information pertaining to yourself and your parents.

PLEASE READ THE FOLLOWING INSTRUCTIONS CAREFULLY, AND SUBMIT ALL REQUESTED DOCUMENTATION; AN INCOMPLETE FORM WILL NOT BE REVIEWED. A FORM WITHOUT ALL REQUIRED DOCUMENTATION WILL NOT BE REVIEWED.

Special circumstances can include such life events as loss of a job or other significant reduction of income, unusually high medical and dental expenses, divorce and/or separation of student and spouse or parent and spouse, etc.

If your special circumstance involves reduction or loss of income in any way, please use the IRS Data Retrieval Tool (DRT) available in the FAFSA completion process:

I have used the IRS DRT with 2015 tax information when completing the FAFSA. ____ (Check if yes) ** If you are unable to use the IRS DRT within the FAFSA, you must also provide 2015 IRS Tax Transcripts.

AND I am submitting IRS tax transcripts for 2016.

2015 and 2016 IRS Tax Return Transcripts may be obtained via:

- **Online Request** - Go to www.irs.gov, under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript by MAIL." Be sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- **Get Transcript ONLINE** - Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- **IRS2Go App** - <http://www.irs.gov/uac/IRS2GoApp>
- **Telephone Request** - 1-800-908-9946
- **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T

For 2015 Income Appeals: You MUST provide 2016 Tax Transcripts for yourself and parent/s (if 2017/18 FAFSA required parent information). AND: Submit the page 2 worksheet regarding income for the 2016 and 2017 years.

All documentation must accompany this form for consideration. If the reduction of income is due to separation or divorce, you must indicate such on the worksheet **AND** submit IRS tax transcripts for both parties for 2015 **AND** 2016 as well as anticipated income for 2017.

If your special circumstances involve unusually high medical/dental expenses for 2015, please stop and read the information here before proceeding:

Unusual Medical/Dental Expenses

Medical/Dental expenses up to 11% of the family's income are already accounted for in the formula that determines a student's "need." Therefore, only the portion of such expenses that exceed 11% would be considered "unusual" and considered for this purpose.

IF your circumstances meet this criteria, you must either submit an IRS Tax Transcript (discussed on page 1) along with the Schedule A from your filed tax return showing itemized medical/dental expenses, **OR** submit copies of all medical/dental receipts (that would be acceptable to the IRS on Schedule A) to the financial aid office (fax 970-947-8318.) Such documentation **MUST** accompany this form for consideration.

INCOME REDUCTION OR NON-RECURRING INCOME:

1. Will you or your parents' income be significantly less in 2016 (or 2017) than in 2015? Yes ___ No___

2. If you answered "yes" to number 1, check the appropriate reason below and provide detailed explanation on a separate page, and be sure to include the date of the change in your situation:

a. ___ Divorce or separation b. ___ Death of a parent c. ___ Disability of student or parent

d. ___ One-time income (e.g., inheritance, moving expense allowance, back-year social security payment, IRA, etc. On another sheet of paper, please identify the source of income; the amount; how the funds were spent or invested; and submit documentation.

e. ___ Loss of or significant reduction in employment; please provide a copy of the separation agreement/termination notice from your previous employer as well as a current statement of unemployment benefits and determination.

3. **Provide** the following information for 2016 and 2017 along with all documentation to verify:

2016 Income: 2017 Income:

▪ Wages, salaries, tips, (including severance pay, disability payments and any income from work.	\$	\$
▪ Other taxable income	\$	\$
▪ Child support to be received and/or alimony from divorce/separation	\$	\$
▪ Other untaxed income	\$	\$
▪ TOTAL income for 2016 & <u>anticipated for 2017</u>	\$	\$

By signing this worksheet, I (we) certify that all information reported to qualify for student aid is complete & correct:

Student's Signature

Date

Spouse's Signature (if married)

Date

Mother/Stepmother's Signature (if dependent)

Date

Father/Stepfather's Signature (if dependent)

Date

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail or both.