

2024-2025 STUDENT SPECIAL CIRCUMSTANCES FORM

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STUDENT NAME

UMass Global ID NUMBER

You may request reconsideration of your financial aid award if you or a family member have special circumstances. Changes resulting from this review do not guarantee an increase in aid. Once this form and all supporting documentation have been received, your request will be reviewed within 14 business days.

What is the change in circumstance? (check all that apply)

	Termination or other employment change		Child care or elder care expenses
	Retirement or Disability		Unusual losses claimed on tax return
	Loss of untaxed income		Severe disability expenses
	Recent divorce or separation		Housing change resulting in homelessness (student)
	Medical/dental bills not covered by insurance		Other (describe in personal statement)

Supporting documentation included (check all that apply)

	Severance letter		Medical/dental bills showing unreimbursed amount
	Most recent paystub showing changed salary		Disability benefits statement
	Final paystub from previous employer		Child/elder care expense receipts
	Unemployment benefits statement		Other
	2022 Federal Income Tax Return		

Do you (or someone in your household) receive any of the following assistance? If yes, please provide documentation of benefits

	Medicaid or Supplemental Security Income (SSI)		Temporary Assistance for Needy Families (TANF)
	Supplemental Nutrition Assistance Program (SNAP)		Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
	Free or Reduced Price School Lunch		Medicaid

Personal Statement:

Attach a personal statement explaining your circumstances. Please provide as much detail as possible to help us better understand your changed financial situation.

Substantial changes in 2023 and/or 2024 income:

If your review request is based on a substantial **change to income in 2023:**

- Include a copy of your 2023 federal tax return along with your documentation.

If your review request is based on a substantial **change to your income in 2024:**

- Itemize below all sources of income, both taxed and untaxed, that you expect to receive in 2024. Use pre-tax income figures and include a number for each item; if the amount is zero, put \$0.

Anticipated 2024 income source:

2024 pre-tax amount:

Student's wages, salaries, tips	\$
Spouse's wages, salaries, tips	\$
Interest income or dividends	\$
Alimony received	\$
Net income from business or farm	\$
Net rental income (or loss)	\$
Pensions, annuities, royalties, partnerships, estates, trusts, etc.	\$
IRA distributions	\$
Capital gains (or losses)	\$
Unemployment compensation, severance pay, etc.	\$
Other taxable income (specify sources: _____)	\$
Child support received	\$
Contribution to tax-deferred retirement plans (401k, 403b, etc.)	\$
Untaxed disability income or Social Security Income	\$
Other untaxed income (specify sources: _____)	\$
TOTAL:	\$

I CERTIFY THE SUBMITTED INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF. I HAVE READ EACH SECTION AND HAVE PROVIDED THE REQUIRED DOCUMENTATION. I UNDERSTAND THAT UNDERESTIMATING PROJECTED INCOME COULD RESULT IN REDUCED ELIGIBILITY AND/OR REPAYMENT OF AID AND/OR DENIAL OF FUTURE REVIEWS/APPEALS.

STUDENT SIGNATURE (wet signature)

DATE

Submit completed form with supporting documents via the **Student Portal** or:
Mail: UMass Global Financial Aid Office, 65 Enterprise, Suite 150, Aliso Viejo CA 62656-2707