



# 2023-24 Student's Income Information for Special Circumstance

Student Name: \_\_\_\_\_

Student ID: \_\_\_\_\_

Tech E-Mail: \_\_\_\_\_

Phone: \_\_\_\_\_

Eligibility for financial aid is based on the 2021 tax year which may not be indicative of a family's continuing ability to pay for a student's educational expenses. To remedy this, Congress has authorized the school's financial aid administrator to evaluate special circumstances on a case-by-case basis with adequate documentation. To begin an appeal, return this completed form (front and back), a personal statement, and any supporting documentation to the Financial Aid Office.

Please do your best to give estimates for the total income sources for the year indicated below. If needed, multiply the dollar amount by the appropriate number of weeks/months/paychecks to determine the gross amount to the list below (e.g., \$1,000 x 12 months = \$12,000). If a line item is left blank, you are certifying you have not received and there is not a possibility of receiving income of that kind.

- Documentation must be included for each of the items you list a value greater than "\$0".
- *Please note that income adjustment requests for the 2022 tax year:*
  - *Requests received prior to 12/1/23, must provide all year-to-date statements (with a minimum of 3 consecutive months' documentation). However, requests that are reviewed 12/1/23 or later will not be processed using this form, but rather the appeal will be reviewed using a signed copy of your 2023 federal tax return.*

Expected Income Sources for (please indicate year): <input type="checkbox"/> 2022 (1/1/2022 – 12/31/2022)    - OR - <input type="checkbox"/> 2023 (1/1/2023-12/31/2023)	Student	Student Spouse (if student is married)
<b>Section A: Taxable Income – *If requesting review for 2022 tax year skip section A.*</b>		
Earned Income from Work (attach copy of most recent paystub(s))	\$	\$
Unemployment Compensation (Gross)	\$	\$
Severance Package/ Retirement Benefits	\$	\$
Alimony Received	\$	\$
Business, Farm or Rental Net Income	\$	\$
Investment Income: Dividends, Interest, Net Rental Income, etc.	\$	\$
Capital Gains (Sale of Property, etc.)	\$	\$
Taxable Social Security or Welfare	\$	\$
IRA/Retirement Account Withdrawals (not included Rollovers)	\$	\$
Pensions and Annuity Income	\$	\$
S Corporation & Partnership Income	\$	\$
<b>Section B: Untaxed Income</b>		
Child Support received	\$	\$
Tax Exempt Interest Income	\$	\$
Untaxed portions of Pension and Annuity Income	\$	\$
Other Untaxed Income: Worker's Compensation or Disability (not Social Sec.)	\$	\$
Non-Educational Veterans Benefits (Exclude GI Bill Benefits)	\$	\$
Payments to tax-deferred pensions and savings	\$	\$
IRA deductions & payments to self-employed SEP,SIMPLE,KEOG or other plans	\$	\$
Untaxed portions of IRA distributions	\$	\$
Military/Clergy Housing Allowance paid to you	\$	\$
Any other income (please itemize)	\$	\$
<b>Section C: Additional Financial Information</b>		
Child Support Paid	\$	\$
Alimony Paid	\$	\$
Taxable Earnings from Need-Based Work-Study	\$	\$
Student Grants or Scholarships Reported to IRS	\$	\$
Taxable Combat Pay or Special Combat Pay	\$	\$

1. **Type a detailed personal statement** of your special circumstance(s) on a separate page and submit with this form.
2. **Notifications:** For all dependent students, notification of requests for additional information, documentation and the results of review will be sent only to your Montana Technological University student email account. If you would like for the information to be shared with your parent, you will need to forward requests to them.
3. **Timeline:** Our first priority is to ensure that all Montana Technological University students have received their original financial aid offer prior to reviewing any special circumstance requests. In order to allow for sufficient time for the student and families to provide necessary documentation, the review of these requests will begin on May 1<sup>st</sup>, 2023 and will be reviewed in the order they are received. **Please note:** that if the student is selected for verification based on their FAFSA application (which utilizes 2021 income), that review must be completed *before* the special circumstance can be reviewed.

Due to the volume of these requests you may experience a notable delay from the date your request is submitted to the date it is reviewed. ***As a result, it is recommended that the student proceed with the accepting of their Financial Aid Offer process in MyMTech from their original aid offer and complete the process for accepting their term charges/"pay my bill" process and utilize that funding to assist with paying for their cost of attending.*** Once the special circumstance is processed, if the student is eligible for increased aid, then those aid sources will be retroactively applied.

All requests and supporting documentation must be submitted by the 1<sup>st</sup> day of the final month of the semester for which the student is enrolled. For example: a fall semester request must have all forms and documentation submitted by December 1<sup>st</sup>.

4. **Certification:** By signing this form, I affirm that all information on this form and on any attachments is complete and accurate to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. The Montana Technological University Financial Aid Office will carefully review your information, but please remember that even though the review of reduced income may result in a lower Expected Family Contribution (EFC), it may not result in additional financial aid. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

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Student Signature (Required)

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Date