2021-22 Parent’s Income Information for Special Circumstance

Student Name: ___________________________ Student ID#: ___________________________
Tech E-Mail: ___________________________ Phone#: ___________________________

Please do your (the parent(s) on the student’s 2021-22 FAFSA) 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 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 2021 tax year:
  - Requests received prior to 12/1/21, must provide all year-to-date statements (with a minimum of 3 consecutive months’ documentation). Requests that are reviewed 12/1/21 or later will not be processed using this form, but rather the appeal will be reviewed using a signed copy of the parent’s 2021 federal tax return.

<table>
<thead>
<tr>
<th>Expected Income Sources for (please indicate year):</th>
<th>Parent</th>
<th>Parent’s Spouse (if parent is married)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020 (1/1/2020 – 12/31/2020)</td>
<td></td>
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<tr>
<td>2021 (1/1/2021-12/31/2021)</td>
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</tbody>
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**Section A: Taxable Income – *If requesting review for 2020 tax year skip section A.*

- 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 $ $ 

**Section B: Untaxed Income

- 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) $ $ 

**Section C: Additional Financial Information

- 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 $ $ 

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.

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. 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.

Parent Signature (Required) ___________________________ Date ___________________________