

2023-2024 Special Circumstances Form

Securely upload documents by logging into your MyHeliotrope account at https://apps.purchase.edu/SecureDocumentUpload/SDU/101/

NAME	Purchase ID

The deadline to submit an appeal is April 15th 2024.

- 1. Completing this form does not guarantee that there will be changes made to your financial aid package.
- 2. If the household's current or projected income remains above \$100,000 it is unlikely that an appeal will change the financial aid package.
- 3. Excelsior Scholarship funding will be reduced by any Federal Pell grant funding awarded as a result of this appeal.
- **4.** A student who already has a zero Expected Family Contribution (EFC), a graduate student or a student working towards a 2nd bachelor's degree may not gain any additional financial aid eligibility.
- 5. If your situation is already reflected on the FAFSA (ex: divorce/separation), we cannot consider your request.

Circumstances that cannot be considered:

- Parents refusing to help pay for college
- Home equity, IRA, 403B, and 401K loans
- Consumer debt, mortgage or rent
- Car payments or car insurance
- Medical insurance premiums
- Reduction in overtime pay

- Individual medical/dental bills/receipts or statements
- Tuition paid for other household members in college
- One year bonus income(s) (ex. lottery or gambling winnings)
- Bankruptcy or income reductions from proceedings
- Unusual personal expenses (ex, wedding expenses, loan payments, legal expenses, home repairs, etc.)

Required documents before an appeal any appeal will be considered:

2023-2024 FAFSA application (https://studentaid.ed.gov/sa/fafsa)
2023-2024 Standard Verification Form Please select the appropriate form based on your dependency status for the FAFSA. The document may be found online at: www.purchase.edu/FinancialServices
2021 Signed copy of the Federal Tax Return or A Tax Return Transcript from the IRS ** Request Transcript from IRS at: https://www.irs.gov/individuals/get-transcript
2022 Signed copy of the Federal Tax Return or A Tax Return Transcript from the IRS ** Request Tax Return Transcript from IRS at: https://www.irs.gov/individuals/get-transcript
2021 W-2 Form(s) Parent(s) and student (and/or spouse's W-2 form(s) if applicable).
2022 W-2 Form(s) Parent(s) and student (and/or spouse's W-2 form(s) if applicable).
Students applying for Special Circumstances after January 1st, 2023. Provide 2023 tax information and 2023 W-2 forms.



2023-2024 Special Circumstances Form

Securely upload documents by logging into your MyHeliotrope account at https://apps.purchase.edu/SecureDocumentUpload/SDU/101/

Indicate your appeal reason below & provide proof as described:

Unemployment or Change in employment.
Documentation of unemployment compensation (if applicable)
 Letter of Termination on company letterhead. Documents not provided on company letterhead must be notarized.
Medical and/or dental expenses not covered by insurance.
Schedule A from Federal Tax Return for the specific year that you are completing this appeal for.
Schedule A nonvederal rax recurrior the specime year that you are completing this appear for
☐ Death of a Spouse or Parent from 2021 to present.
Provide a copy of the Death Certificate
☐ Tuition paid for another child in Elementary or High School
i i
Provide proof of payment to child's school
One- Time Income
Documentation showing source and amount of one-time income
 Signed One-Time Income Form that shows how the funds were spent and why the funds are not available
Other loss of Income- (Not including loss of untaxed income such as Social Security benefits)
 Examples are: alimony, child support, retirement/pension, worker's compensation, etc.
 Documentation of payment(s) received (must display total amount received and date payment(s) became effective)
Explain the reason for submitting this appeal. Attach additional pages if necessary.
Explain the reason for submitting this appear. Attach additional pages if necessary.



2023-2024 Special Circumstances Form

Securely upload documents by logging into your MyHeliotrope account at https://apps.purchase.edu/SecureDocumentUpload/SDU/101/

Please use the chart below to estimate your income for 2023.

Do not leave any spaces blank; If it does not apply or the answer is \$0 please indicate this.

Estimated Income from January 2023- December 2023	Father	Mother	Student	Spouse (if applicable)
Wages, Salaries, Tips				
Interest and/or Divided Income				
Business/Farm Income				
Unemployment Compensation				
Workers Compensation				
Pension and/or Annuities				
Severance Pay				
Retirement Benefits				
Disability Benefits				
Social Security Benefits (taxable)				
Child Support Received				
Alimony/Spousal Support				
Other income				
Total	\$	\$	\$	\$

Signatures

By signing this document, we certify that all information reported in support of the student's application for financial assistance is complete and accurate. The documented information provided may be used to make changes to the 2020-2021 FAFSA.				
STUDENT:				
	Printed Name	Signature	Date	
PARENT:				
	Printed Name	Signature	Date	
SPOUSE:				
(if applicable)	Printed Name	Signature	Date	