

#### 2025-2026 Special Circumstances Form

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NAME	Purchase ID

#### The deadline to submit an appeal is April 15th, 2026.

- 1. Completing this form does **NOT** guarantee that there will be changes made to your financial aid package. This process is entirely manual and reviewed on a first-come, first-served basis. As a result, the timing for a final determination to your appeal may vary.
- 2. If the household's current or projected income remains at or above \$100,000 it is unlikely that an appeal will change your 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 or a low Expected Family Contribution (EFC), a graduate student or a student working towards a 2<sup>nd</sup> bachelor's degree may <u>not</u> 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 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:

2025-2026 FAFSA application (https://studentaid.ed.gov/sa/fafsa)
2025-2026 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
2023 Signed copy of the Federal Tax Return or A Tax Return Transcript from the IRS **  Request Transcript from IRS at: <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a>
2024 Signed copy of the Federal Tax Return or A Tax Return Transcript from the IRS **  Request Tax Return Transcript from IRS at: <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a>
2023 W-2 Form(s)  Parent(s) and student (and/or spouse's W-2 form(s) if applicable).
2024 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, 2026.  Provide 2025 tax information and 2025 W-2 forms.



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# Indicate your appeal reason below & provide proof as described:

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Unemployment or Change in employment.	
Documentation of Unemployment Compensation (if applicable)	
<ul> <li>Letter of Termination on company letterhead. Documents not provided on company letterhead must be notarized.</li> </ul>	
<ul> <li>If still employed at job, you must wait until termination or job change is effective to provide above documentation.</li> </ul>	
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Medical and/or Dental expenses not covered by insurance.	
<ul> <li>Schedule A from Federal Tax Return for the specific year that you are completing this appeal for.</li> </ul>	
Schedule A from rederal rax keturn for the specific year that you are completing this appear for.	
Death of a Spouse or Parent from 2023 to Present.	
Provide a copy of the Death Certificate	
☐ Tuition paid for another child in Primary or Secondary education (K-12)	
Provide proof of payment to child's school	
One- Time Income	
<ul> <li>Documentation showing source and amount of one-time income</li> </ul>	
<ul> <li>Signed One-Time Income Form that shows how the funds were spent and why the funds are not available</li> </ul>	
Other loss of Income- (Not including loss of untaxed income such as Social Security benefits)	
<ul> <li>Examples are: alimony, child support, retirement/pension, worker's compensation, etc.</li> </ul>	
<ul> <li>Documentation of payment(s) received (must display total amount received and date payment(s) became effective)</li> </ul>	
Boodinentation of payment(s) received (mast display total amount received and date payment(s) securite effective)	
<b>Explain the reason for submitting this appeal.</b> Attach additional pages if necessary.	



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### Please use the chart below to estimate your income for 2025.

Do <u>not</u> leave ANY spaces blank; If it does not apply *or* the answer is \$0 - please indicate this.

Estimated Income from January 2025 - December 2025	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 2025-2026 FAFSA.					
STUDENT:					
	Printed Name	Signature	Date		
PARENT:					
	Printed Name	Signature	Date		
SPOUSE:					
(if applicable)	Printed Name	Signature	Date		