

Dependent Special Conditions Application **CHECKLIST**

- ___ 1) On page 1 check your reason for submitting the application.
- ___ 2) Write a statement of explanation detailing the reason for the application. Attach an additional sheet if needed.
- ___ 3) On page 2 complete the projected gross income.
Do not leave any blanks.
- ___ 4) Provide detailed info as to how you arrived at the given amounts.
- ___ 5) Provide proof of the last date of employment if now unemployed.
- ___ 6) Provide a COPY of the last pay stub if now unemployed.
- ___ 7) Provide a signed COPY of the prior year tax return and W2's.
- ___ 8) Provide a COPY of the latest paycheck/stub if claiming a reduction of income.

I verify that I have carefully reviewed the Application for Special Condition, checked off items as needed on the checklist and provided all necessary documentation to the best of my ability.

Student Signature

Date

Parent Signature (if student is dependent)

Date

**** If sufficient information is not provided, the application will be returned to you.**

2011-2012

DEPENDENT SPECIAL CONDITIONS

If your family's 2011 income has or will be reduced, you should complete this form and return it to Cameron University Financial Assistance Office for further consideration of your 2011-2012 application.

Please use this checklist to assure that you have all required documentation that we need to complete your special conditions request.

Please bring in copies of the following items:

- Your parents' last pay stub with year-to-date earnings from all your parents' employers.
- A letter from your parents' last employer stating the last day worked. If parent(s) were active duty military a DD214 will be sufficient.
- A copy of your parents' 2010 Federal Income Tax Return and W2s.
- Verification of all untaxed income that your parent(s) have received for the year 2011. This means ALL income that will not have to be reported on their Federal 1040 Tax Return.
- If your parents have received ANY unemployment benefits from the employment agency, we will need proof from their office of how much they have received for the year 2011.

Print Student's Name

CU ID#

Please review the sections below and indicate which explanation(s) apply to the reason(s) your family's 2011 income was or will be reduced.

- Father has retired, been unemployed for at least two full months, or will experience a change in employment status which will result in an income reduction **AFTER January 1, 2010**. Attach verification, i.e.: **Statement from employer indicating last date worked, or DD214**. Effective date of new employment status: _____
Month/Day/Year
- Mother has retired, been unemployed for at least two full months, or will experience a change in employment status which will result in an income reduction **AFTER January 1, 2010**. Attach verification, i.e.: **Statement from employer indicating last date worked, or DD214**. Effective date of new employment status: _____
Month/Day/Year
- Untaxed income has ceased or been reduced. **Attach verification**. Date untaxed income changed: _____
Month/Day/Year
- **Permanent** and **total** disability of father or mother (must have occurred **AFTER January 1, 2010**). **Attach verification**. Date of disability: _____
Month/Day/Year
- Death of parent (death must have occurred **AFTER January 1, 2010**), **please attach a copy of death certificate**. Date of death: _____
Month/Day/Year
- One-time lump sum payment received (i.e.: severance, inheritance, lottery, etc.)

COMPLETION REQUIRED: YOU MUST PROVIDE AN EXPLANATION DETAILING ALL REASONS YOUR FAMILY'S INCOME WAS OR WILL BE REDUCED AND COMPLETE THE REST OF THIS FORM.

WORKSHEET FOR PROJECTED 2011 INCOME

	Father's Income (gross wages)	Mother's Income (gross wages)	Unemployment Benefits	Untaxed Income
Jan	\$	\$	\$	\$
Feb	\$	\$	\$	\$
March	\$	\$	\$	\$
April	\$	\$	\$	\$
May	\$	\$	\$	\$
June	\$	\$	\$	\$
July	\$	\$	\$	\$
Aug	\$	\$	\$	\$
Sept	\$	\$	\$	\$
Oct	\$	\$	\$	\$
Nov	\$	\$	\$	\$
Dec	\$	\$	\$	\$
	\$	\$	\$	\$
Total	\$	\$	\$	\$

Please turn in this worksheet with your Special Condition Application.

You will need to provide a narrative statement along with documentation (i.e., pay stubs, etc.) to support how you arrived at the above figures for the 2011 income.

Use the Total figures from this worksheet to complete the next page.

Complete both sections (Gross Taxed and Untaxed) below with income (prior to exemptions, adjustments, or deductions) your family expects to receive from January 1, 2011 until December 31, 2011. **IF NONE, ENTER ZEROS AND EXPLAIN ON THE REVERSE SIDE OF THIS PAGE HOW YOUR FAMILY IS LIVING.**

2011 GROSS TAXED INCOME	FATHER'S INCOME	MOTHER'S INCOME
Wages, salaries and/or tips for 2011	\$	\$
Severance pay for year 2011	\$	\$
Pensions and Annuities for year 2011	\$	\$
Interest and dividend income for year 2011	\$	\$
Business or Farm income for year 2011	\$	\$
Capital gains for year 2011	\$	\$
Income rec'd from rents after expenses paid for mortgage interest, taxes, insurance for 2011	\$	\$
Alimony which will be received for year 2011	\$	\$
Unemployment compensation for year 2011	\$	\$
Any other taxed income for year 2011	\$	\$
TOTAL 2011 GROSS TAXED INCOME:	\$	\$

2011 UNTAXED INCOME	FATHER'S INCOME	MOTHER'S INCOME
Payments to Tax-deferred Pension & Savings Plans (paid directly or withheld from earnings). Include untaxed portion of 401k and 403b plans for 2011.	\$	\$
Social Security benefits (SSI or disability) received by student, children or spouse, if married, for the 2011	\$	\$
Retirement or Disability Benefits for 2011	\$	\$
Workers' Compensation for 2011	\$	\$
Welfare benefits including TANF (excluding Food Stamps) for 2011	\$	\$
Untaxed portion of pensions for 2011	\$	\$
Living & Housing allowances (excluding rent subsidies for low income housing) for clergy, military and others (include CASH payments and cash value of benefits) for 2011. Don't include the value of on-base military housing or the value of basic military housing allowance.	\$	\$
Child Support or Maintenance payments which will be received for <u>ALL</u> children for the year 2011	\$	\$
Cash support or money given on student's behalf for 2011	\$	\$
Veteran's Benefits, except Student's Educational Benefits, for the year 2011	\$	\$
Railroad Retirement Benefits for the year 2011	\$	\$
Any other Untaxed Income and Benefits such as Black Lung Benefits, Refugee Assistance, etc., for year 2011	\$	\$
TOTAL 2011 UNTAXED INCOME:		

THE PENALTY FOR SUBMISSION OF FRAUDULENT INFORMATION ON THIS FORM MAY BE REPAYMENT OF TRIPLE ANY AMOUNT OF MONEY RECEIVED PLUS A FINE AND/OR IMPRISONMENT.

Signature of Student _____

Date _____

Signature of Parent _____

Date _____

Email Address _____