

Independent 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 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 INDEPENDENT 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.

Review this check list to assure that you have all required documentation that we need to complete your special conditions.

Please bring in COPIES of the following items:

- ✓ Your and/or your spouse's most recent/last pay stub with year-to-date earnings from all employers.
- ✓ A letter from your prior employer(s) stating the last day worked. If you and/or your spouse were active duty military, a DD214 will be sufficient.
- ✓ A copy of your and (if married) your spouse's 2010 federal income tax return and W2s.
- ✓ Verification of all nontaxable income that you and your spouse have received for the full year of 2011. This means ALL income that will not have to be reported on your Federal 1040 tax return.
- ✓ If you and/or your spouse have received ANY unemployment benefits we will need proof from the employment office of how much you and/or your spouse have received for the year 2011.

Print Student's Name

CU ID#

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

- Student has retired, been unemployed for at least two full months, or will experience a change in employment status due to enrollment in a post secondary institution. **Attach verification. i.e.: Statement from employer indicating last date worked, Year to Date Earnings, Last Pay stub, or DD 214.**
Effective Date of new Employment Status: _____
Month/Day/Year
- Spouse has retired, been unemployed for at least two full months, or has experienced 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, Year to Date Earnings, Last Pay stub, or DD 214.**
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 spouse or applicant (must have occurred **AFTER January 1, 2010.**) **Attach verification.** Date of disability: _____
Month/Day/Year
- Death of Spouse (death must have occurred **AFTER January 1, 2010.**) **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

| | Student's Income (gross wages) | Spouse'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 Total figures from this worksheet to complete the next page.

Complete both sections (Gross Taxed and Untaxed) below with income (prior to exemptions, adjustments, 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 YOU ARE LIVING.**

| 2011 GROSS TAXED INCOME | STUDENT'S INCOME | SPOUSE'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 received 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 | STUDENT'S INCOME | SPOUSE'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 (exclude rent subsidies for low income housing) for clergy, military and others (include CASH payments or 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 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 Spouse (if married)

Date

E-mail Address _____