



## 2009-10 Request for Re-evaluation Based on Special Circumstances

Complete this form only if you, your spouse, or your parent(s) expect a significant decrease in income for the year 2009 as a result of special circumstances. Special circumstances may include loss of income, unemployment benefits, separation, leaving job to attend college, etc.

Please Print

Student Name \_\_\_\_\_ SSN or ID \_\_\_\_\_

Address \_\_\_\_\_ Home Phone \_\_\_\_\_

\_\_\_\_\_ Cell Phone \_\_\_\_\_

1. Report only the income where you expect a change.
  - a. We will assume items left blank to be the same as in 2008.
  - b. If the answer is zero, please write "0".
  - c. We will assume the income for other household members will remain the same as 2008.
2. Be sure to explain your circumstances in the **comments section**.
3. Documentation must be attached to this form.

Check whose income has decreased in 2009 and report that person's income below:

\_\_\_ Student \_\_\_ Student's Spouse \_\_\_ Mother \_\_\_ Father

### ***Projected 2009 Income – enter amounts***

\$ \_\_\_\_\_ Income from work for the year 2009 (January through December)

\$ \_\_\_\_\_ Unemployment benefits received or expected during 2009 (January through December)

\$ \_\_\_\_\_ Other taxable income – interest, dividends

### ***Projected 2009 Untaxed Income and Benefits***

\$ \_\_\_\_\_ Expected Earned Income Credit or Additional Child Care Credit for 2009

\$ \_\_\_\_\_ Child support received or expected during 2009 (January through December)

\$ \_\_\_\_\_ Payments to tax-deferred pension and savings plans; IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans

\$ \_\_\_\_\_ Tax exempt interest; foreign income exclusion; credit for federal tax on special fuels

\$ \_\_\_\_\_ Veterans non educational benefits, such as disability, death pension, DIC, or VA work study allowance

\$ \_\_\_\_\_ Any other untaxed income or benefits, workmen's compensation, untaxed portions of Railroad Retirement benefits, Black lung benefits, Refugee Assistance. Don't include student aid, educational WIA benefits, or flexible spending arrangements (e.g. cafeteria plans)

\$ \_\_\_\_\_ Welfare benefits, including Temporary Assistance for Needy Families received during 2009 (January through December)

\$ \_\_\_\_\_ Social Security benefits received during 2009 (January through December)

**Projected 2009 Income Exclusions**

- \$ \_\_\_\_\_ Education credits (Hope and Lifetime Learning Tax Credits)
- \$ \_\_\_\_\_ Child support paid out during 2009 due to divorce/separation. Do not include support for children living in your household.
- \$ \_\_\_\_\_ Taxable earnings from the Federal Work Study Program (or other need based work program)
- \$ \_\_\_\_\_ Student grant, scholarship, and fellowship, including AmeriCorps awards that will be reported to the IRS in your adjusted gross income

**Complete this section if:**

... You expect a significant decrease in income as a result of special circumstances from September 2009 through May 2010. Do not leave any question blank. Put "0" if not applicable.

Check whose income is expected to decrease from September through May and report that person's income below:

\_\_\_ Student \_\_\_ Student's Spouse \_\_\_ Mother \_\_\_ Father

*June 2009 – Aug 2009 Sept 2009 – May 2010*

- \$ \_\_\_\_\_ \$ \_\_\_\_\_ Expected income from work
- \$ \_\_\_\_\_ \$ \_\_\_\_\_ Other taxable income – include interest, dividends, taxable social security
- \$ \_\_\_\_\_ \$ \_\_\_\_\_ Other untaxed income and benefits – refer to categories on page 1 of this form
- \$ \_\_\_\_\_ \$ \_\_\_\_\_ Income exclusions – refer to categories on the top of this page

**Comments:**

Please explain your special circumstance(s) for reevaluation **and attach supporting documentation.**

---



---



---



---

**The documents listed must accompany this form** – place a checkmark if attached; write in n/a if not applicable.

- \_\_\_\_\_ 2008 signed tax return
- \_\_\_\_\_ 2008 W-2 forms
- \_\_\_\_\_ 2008 unemployment benefit statement –form 1099
- \_\_\_\_\_ Verification Form (download from: [www.bristolcc.edu](http://www.bristolcc.edu); go to Enrollment Center; then Financial Aid, then Forms)
- \_\_\_\_\_ Most recent paystub from all jobs held in 2009 – or 2009 W-2 form
- \_\_\_\_\_ Unemployment benefit statement for 2009

Additional documentation may be requested depending on the circumstances reported in this request.

Note:

- Re-evaluations are reviewed July 1 through August 1; October 1 through December 15; February 15 through May 15.
- Continue to explore all financing options while we consider your appeal.
- A pending appeal does not postpone the payment of a tuition bill or delay the bill due date.

*I attest that this information is true and correct to the best of my knowledge.*

Student's signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse or Parent's signature \_\_\_\_\_ Date \_\_\_\_\_