

**UNIVERSITY OF NEW MEXICO
STUDENT FINANCIAL AID OFFICE
2014–2015 DEPENDENT STUDENT’S SPECIAL CIRCUMSTANCES APPLICATION**

In accordance with federal regulations, your and your parents’ 2013 income is used to determine your eligibility for financial aid for the 2014–2015 academic year. However, there are special circumstances under which we may be able to recalculate your eligibility for financial aid using your and/or your parents’ 2014 income or adjusted 2013 income. The special circumstances which we may consider include:

- As of today, are you or one of your parents unemployed?
- As of today, are you or one of your parents a dislocated worker?
- 2014 income will be lower than 2013 income
- Unusual debts
- Unusually high medical/dental expenses (in excess of 11% of total income)
- Tuition/fees for private **elementary/secondary** education for your parents’ dependent(s)
- Adult care expenses
- Parent(s) enrolled at least half–time in a degree, certificate, or other program leading to a recognized educational credential at a Title IV–eligible institution.

If you or your parent(s) meet at least one of the circumstances listed above, complete the sections of this form which pertain to you including the “**Summary of Special Circumstances**” section on page 3 and the “**Certification**” section on page 4.

PLEASE NOTE that all requests for **reduction or loss of income*** must be submitted by **November 1, 2014**. We will require a **signed** copy of your family’s 2014 federal income tax return and 2014 W–2 form(s) for any income adjustment requests submitted after **November 1**.

Student’s Printed Name	UNM ID Number
Telephone Number	E–mail Address

CHECK THE CIRCUMSTANCE THAT APPLIES TO YOUR SITUATION

STUDENT UNEMPLOYED

Circumstance

Student Unemployed/Dislocated Worker	You are receiving unemployment benefits due to being laid off or losing a job, and are receiving unemployment benefits. Provide a letter from the state unemployment agency within 90 days from the date of issuance of the letter or other evidence that you are receiving unemployment benefits.
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REDUCTION OF INCOME FROM WORK FOR STUDENT *
Complete the Income Worksheet on page 3 of this form.

Circumstance

Loss of Income	You are currently employed, but have less income for 2014 compared to 2013. Provide documentation of 2014 income to date and documentation of lay–off, termination, or reduced hours.
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REDUCTION OF INCOME FROM WORK FOR PARENT*
Complete the Income Worksheet on page 3 of this form.

Circumstance

Parent Unemployed/Dislocated Worker	In general, a parent may be considered a dislocated worker if he or she: has been laid off or received a lay–off notice from a job; was self–employed but is now unemployed due to economic conditions or natural disaster; or is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay–at–home mom or dad), is no longer supported by the husband or wife, is unemployed or underemployed, and is having trouble finding or upgrading employment. Provide documentation of your parent’s 2014 income to date and documentation of lay–off or termination.
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LOSS OF OTHER INCOME *

Circumstance

Alimony Ended	Provide court documentation indicating date of termination and the amount received.
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Circumstance

Unemployment Ended	Provide documentation from the Dept. of Labor indicating the beginning and ending dates of this benefit and the amount received.
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Circumstance

Child Support Ended	Provide court documentation indicating date of termination and amount received.
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Circumstance

Other Income Ended	Specify other circumstance and provide appropriate documentation . _____
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DIVORCE/SEPARATION/DEATH OF A PARENT

Circumstance

Divorce or Separation	Since applying for financial aid, your parents have become divorced or separated. Provide legal documentation of the date of the divorce or separation, copy(ies) of parents' 2013 W-2 form(s) and a signed copy of parents' 2013 federal income tax returns.
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Circumstance

Death of a Parent	Since applying for financial aid, a parent is no longer living. Provide documentation of the date of death, copy(ies) of parents' 2013 W-2 form(s) and a signed copy of parents' 2013 federal income tax returns.
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ONE-TIME INCOME *

Circumstance

One-Time Source of Income	In 2013, you or your parents received a one-time source of income such as: inheritance, moving expense allowance, back-year social security payments, IRA distribution, etc. Provide a signed copy of your or your parents' 2013 federal income tax return verifying the source of income, documentation from the Social Security Administration of back-year payments, etc. Other documentation may be requested by your Student Financial Aid Officer. NOTE: WINNINGS FROM GAMBLING ARE NOT CONSIDERED A SPECIAL CIRCUMSTANCE. _____
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List the one-time source of income

UNUSUALLY HIGH MEDICAL/DENTAL EXPENSES

Circumstance

<p>Medical/dental expenses up to 11% of the family's total income are already taken into account by the federal needs analysis formula when determining financial aid eligibility. Therefore, only the portion of expenses which exceeds 11% of total income will be considered an unusual circumstance.</p> <p>If your parents itemized medical/dental expenses in 2013, provide a signed copy of their 2013 federal income tax return, with Schedule A. If medical/dental expenses were not itemized in 2013, provide receipts of medical and dental expenses paid by your parents (not covered by insurance) in 2013.</p> <p>You may only claim medical/dental expenses for yourself, your parents, or their dependents that are included on your Free Application for Federal Student Aid (FAFSA).</p> <p>List below the family member for whom medical/dental expenses were incurred in 2013. Name: _____ Relationship to student: _____</p>

ELEMENTARY/SECONDARY EDUCATION AND ADULT CARE EXPENSES

Circumstance

Provide documentation for each family member you included in your family size on your Free Application for Federal Student Aid (FAFSA) for whom your parents paid tuition/fees for private elementary or secondary education, or adult care expenses.

Name: _____ Relationship to student: _____.

Documentation required: Signed copy of your parents' 2013 federal income tax return (to verify dependents) and receipts for tuition or adult care payments made in **calendar year 2013**.

UNUSUAL DEBTS

Circumstance

Unusual debts (legal fees for divorce, adoption, education loans) for which you or your parents are currently making payments. **Provide** receipts or a payment summary from the person, company, or agency to whom or which money is owed. **Documentation must include** the following, and must have been incurred by student or parents:

- Type or cause of debt
- Owed by whom Name: _____ Relationship to student: _____.
- Balance owed on debt
- Monthly payment amount
- Date incurred
- Date payments began and date payments end

DOES NOT INCLUDE CREDIT CARD DEBT.

2014 INCOME WORKSHEET

You must provide documentation of ALL sources of income received as of the date this form is completed.

2014 Income earned from work by student	\$
2014 Income earned from work by mother or stepmother	\$
2014 Income earned from work by father or stepfather	\$
2014 Other taxable income: list type(s)_____	\$
Include: dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.	
2014 Social Security benefits	\$
2014 Temporary Assistance for Needy Families (TANF)	\$
2014 Child support received	\$
2014 Other untaxed income: list type(s)_____	\$
Include: earned income credit, untaxed social security benefits, supplemental security income, etc.	
Total 2014 income	\$

SUMMARY OF SPECIAL CIRCUMSTANCES

Please summarize your special circumstances (attach a separate sheet of paper if necessary):

PARENT(S) ENROLLED IN A POST-SECONDARY INSTITUTION

Complete if one or both of your parents (**WHOM YOU INCLUDED ON THE FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA)**) is enrolled at least half-time (6 hours undergraduate, 5 hours graduate) in a degree, certificate, or other program leading to a recognized educational credential at a Title IV-eligible institution during the 2014-2015 academic year.

Parent's Printed Name	Social Security Number
Name of Institution	Title IV School Code
Enrollment Date -- From	Enrollment Date -- To

You must **provide documentation** to the Financial Aid Office **each semester** of costs for tuition/fees and books/supplies for your parent(s).

Have the Financial Aid Office at the school your parent attends complete the section below. In addition, **attach** a copy of your parent's registration for the 2014-2015 academic year and **documentation** of **required** tuition/fees and/or books/supplies' costs. **If your parent's tuition/fees and/or books/supplies are being paid for by any source other than themselves, you are not eligible to complete this section of the Special Circumstances application.** If your parent receives assistance that pays for tuition/fees and/or books/supplies after you have submitted this Special Circumstances application, you must notify your Student Financial Aid Officer.

To be completed by the Student Financial Aid Office at the school your parent attends (one for each parent):

This is to certify that _____, Social Security No. _____ is receiving the following financial aid/assistance for attendance at (name of institution) _____

Has the student listed above applied for financial aid at your institution? Yes No

Cost of Attendance	\$
Gift Aid Eligibility	-
Third-Party Payments (DVR, JTPA, etc.)	-
Unmet Need	\$

Signature of School Official	Printed Name	Title	Date Signed

CERTIFICATION

I (We) certify that the information provided on this form, and the accompanying documentation, is true and complete to the best of my (our) knowledge. I (We) agree to provide proof of the information that I (we) have given on this form if requested by the Financial Aid Office.

Student's Signature	Mother's/Stepmother's Signature
Father's/Stepfather's Signature	Date Signed

The University of New Mexico is an Equal Opportunity/Affirmative Action institution. Pursuant to the Americans with Disabilities Act, if you require this information in alternative format or have special needs, please contact the Office of Student Financial Aid for assistance.