

Mercy College

Dependent Student Financial Aid Appeal 2011-2012

Student's Name _____ Student's SSN _____

Student's Home Address _____

Student's Home Phone # _____ Date _____

Student's Date of Birth _____

Parent's Name _____ Daytime Phone # _____

For Office use only: Current EFC _____ Date Sent to Processor _____ Adjusted EFC _____

Please complete all sections that apply to your situation.

Parent Reduction in Work Income due to Unemployment

This section applies only if a parent who earned money in 2010 has lost his/her job for at least 10 weeks in 2011. Which parent(s) lost employment: (Circle one →) Father / Mother

Complete the parent section of the Estimated Income Worksheet on page 3 (be sure to include any unemployment benefits) and provide a copy of the first two pages and Schedule A (if applicable) of your parents' 2010 US Income Tax Return with copies of all W-2 Statements. Please explain your income estimate on page 4 and attach any supporting documentation.

Parent Reduction in Work Income Due to Disability or Natural Disaster

This section applies only if a parent who earned money in 2010 has not been able to earn money in his/her usual way for at least 10 weeks in 2011 due to a disability or a natural disaster that occurred in 2010 or 2011. **Loss of overtime earnings does not meet this requirement.** Which parent(s) lost employment: (Circle one →) Father / Mother

Complete the parent section of the Estimated Income Worksheet on page 3 (be sure to include any disability benefits) and provide a copy of the first two pages and Schedule A (if applicable) of your parents' 2010 US Income Tax Return with copies of all W-2 Statements. Please explain your income estimate on page 4 and attach any supporting documentation.

Parent Reduction in Work Income for Reasons Other Than Those in Items 1 and 2

- Your parent is self-employed and has experienced a significant decrease in income from 2010 to 2011. Complete the parent section of the Estimated Income Worksheet on page 3. Please explain your income estimate on page 4 and attach any supporting documentation.

- Your parent(s) has had a decrease in income from 2010 to 2011 due to a change in employment. Complete the parent section of the Estimated Income Worksheet on page 3. Please explain your income estimate on page 4 and attach any supporting documentation.

Loss of Unemployment Compensation, Untaxed Income or Benefits

This section applies only if you or your parent received taxable unemployment compensation, untaxed income or benefits in 2010 (i.e., child support, Social Security, AFDC), but lost or had a reduction in that income or benefit. The untaxed income or benefits must be from a public or private agency, from a company, or from a person because of court order. Social Security Benefits received by a parent for a student are parent benefits. You must attach proof of your loss or reduction or a copy of the court order that resulted in the loss.

Type of benefits: _____ Benefits were in the name of (circle one →) Student/Parent

Date benefits ended/were reduced: Month _____ Year _____

Complete the parent or student section (as applicable) of the Estimated Income Worksheet on page 3. Also provide a copy of the first two pages and Schedule A (if applicable) of your or your parents' (if applicable) 2010 US Income Tax Return along with copies of all W-2 Statements.

Parents' Unusually High Uninsured Medical and Dental Expenses

This section applies only if your family incurred or will incur uninsured medical and dental expenses (including insurance premiums) for 2010 **in excess of 4% of the parents' adjusted gross income as reported on their 2010 US Income Tax Return.** You must attach itemized proof of these unreimbursed expenses and a copy of the first two pages of your parents' 2010 US Income Tax Return. Receipts, insurance records, and/or doctor's records/estimates are acceptable as proof.

Total uninsured medical and dental expenses for 2010 \$ _____

Tuition Expenses at an Elementary or Secondary School

Complete this section if your family will have a dependent child or children enrolled at a private elementary or secondary school during the 2011-2012 school year and your family is responsible for paying tuition. Please attach receipts of fees paid or an official school billing statement.

Net tuition for children enrolled at _____ will be \$ _____

Parents' Separation/Divorce or Death of a Parent

This section applies only if your parents separated or divorced after the 2011-2012 FAFSA was completed or a parent passed away after the 2011-2012 FAFSA was completed.

For Parents' Separation or Divorce which parent do you live with? (circle one →) Father / Mother
That parent's age is _____. Date of separation or divorce: Month _____ Year _____

For Death of a Parent: Surviving parent is? (circle one →) Father / Mother
Surviving parent's age is _____. Date of Death: Month _____ Year _____

Fill out the parent section of the Estimated Income Worksheet on page 3 for the parent household in which you live or for the surviving parent and explain your income estimate on page 4.

ESTIMATED INCOME WORKSHEET

Student Income Section: Estimated student income (gross amount) for calendar year 2011 (do not include student financial aid such as work-study earnings).

	INCOME ¹		
January – May	\$ _____	Annual Social Security Benefit	\$ _____
June – August	\$ _____	Annual AFDC/ADC	\$ _____
September - December	\$ _____	Annual Other Untaxed Income	\$ _____

Parent Income Section: Estimated parent income (gross amount) for the current calendar year.

	NAMES OF EMPLOYERS	EARNINGS ¹
Father's Earnings	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
Mother's Earnings	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
Unemployment compensation and/or severance pay ²		\$ _____
Other taxable income (such as capital gains, interest, dividends) ³		\$ _____
Untaxed income:		
Social Security \$ _____	AFDC/ADC \$ _____	Other ⁴ \$ _____

Please clarify on page 4 the reason(s) for submitting this appeal. To assist us in calculating potential tax liability based on estimated income, please make sure that you enclose the requested pages of the 2010 US Income Tax Return along with copies of related W-2 Statements (if applicable). Remember to sign the certification at the bottom of page 4.

¹ On Page 4 provide a detailed breakdown showing how you arrived at your earnings estimate (i.e. total hours worked x hourly rate or gross monthly salary x months employed). Also note on page 4 if any tax-sheltered income such as 401k contributions is part of the estimated earnings.

² On Page 4 provide a detailed breakdown illustrating how you arrived at the sum of estimated unemployment compensation (i.e. weekly amount x number of weeks). If you are receiving severance pay please provide information about the payment arrangements (i.e. lump sum, monthly distribution, etc).

³ When estimating interest and/or dividend income provide as much detail as possible on page 4 concerning how you arrived at your estimate (i.e. you assumed a rate of x% return on your total savings/investments of \$x).

⁴ Other untaxed income could include things such as clergy housing allowance, child support, tax sheltered income such as an annual contribution to an IRA, 401k, 403b, worker's compensation, VA assistance, or disability income.

