

Mercy College

Independent 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 _____

Spouse'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.

Reduction in Work Income due to Unemployment

This section applies only if a student/spouse who earned money in 2010 has lost his/her job for at least 10 weeks in 2011. Which person lost employment: (Circle one →) Student / Spouse

Complete 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 yours and your spouse's 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.

Reduction in Work Income Due to Disability or Natural Disaster

This section applies only if a student/spouse 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 person lost employment: (Circle one →) Student / Spouse

Complete 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 yours and your spouse's 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.

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

- You or your spouse is self-employed and has experienced a significant decrease in income from 2010 to 2011. **Complete the Estimated Income Worksheet on page 3. Please explain your income estimate on page 4 and attach any supporting documentation.**
- You or your spouse has had a decrease in income from 2010 to 2011 due to a change in employment. **Complete 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 spouse 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. 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/Spouse

Date benefits ended/were reduced: Month _____ Year _____

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

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 your adjusted gross income as reported on your 2010 US Income Tax Return.** You must attach itemized proof of these unreimbursed expenses and a copy of the first two pages of yours and your spouse's 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 \$ _____

Separation/Divorce or Death of a Spouse

This section applies only if you and your spouse separated or divorced after the 2011-2012 FAFSA was completed or your spouse passed away after the 2011-2012 FAFSA was completed.

Date of separation or divorce: Month _____ Year _____

Date of Death: Month _____ Year _____

Fill out the Estimated Income Worksheet on page 3 for your household and explain your income estimate on page 4.

ESTIMATED INCOME WORKSHEET

Income Section: Estimated 2011 income (gross amount):

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

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 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).

² 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).

³ 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.

