

# Hobart and William Smith Colleges

## Special Circumstance Form 2012 – 2013

STUDENT NAME: \_\_\_\_\_ HWS STUDENT ID: \_\_\_\_\_

YEAR IN SCHOOL: FR SO JR SR (circle one)

The Office of Financial Aid realizes that families sometimes experience unforeseen circumstances and/or expenses during an academic year. This form is designed to help you address your need for additional financial assistance due to your family's current economic situation. Please note, in order to accurately project the impact of your special circumstances it will be necessary to verify all financial information reported on your 2012-13 FAFSA using your 2011 IRS Tax Return Transcript.

**If you were not selected for verification please submit your 2011 IRS Tax Return Transcript with this form.**

*Note: We cannot accept Federal Income Tax Returns. You may request an IRS Tax Return Transcript by calling 800-829-1040 or complete Form 4506-T at [www.irs.gov](http://www.irs.gov). If you filed electronically, the IRS will provide your information within 10-14 days; if you filed manually, it may take 4-6 weeks for your information to be processed for your IRS Tax Return Transcript.*

**Submit all documentation to: Offices of Financial Aid, 300 Pulteney Street, Geneva, NY 14456**

An incomplete form or missing documentation will delay review of your request. Please allow 5 – 10 business days for a response.

### INSTRUCTIONS

#### SECTION A: SPECIAL CIRCUMSTANCE FOR CONSIDERATION

Read through each circumstance below carefully and circle the special condition(s) that best describe your current family/economic situation. Submit the completed Special Circumstance Form along with a letter of explanation and all required documentation (indicated to the right below) to the Office of Financial Aid. Review of your special circumstances will not begin until **all** required documents are received.

Special Circumstance	Required Documents
<p><b>1. Change In Marital Status:</b> A recent widowed, divorced, or separated situation:</p> <p style="padding-left: 40px;"><b>Marital Status:</b> _____</p> <p style="padding-left: 40px;"><b>Marital Status Date:</b> _____</p>	<p>1. Legal document substantiating change of marital status or proof of separate residences; copy of death certificate if appropriate. Complete Section B of this form using custodial parent income information only.</p>
<p><b>2. Reduction or Loss of Income:</b> Income loss or reduction due to unemployment, job change, bankruptcy, illness, etc.</p>	<p>2. Proof of reduction or loss of job; statement from employer, copy of last pay stub and/or new job pay stub and/or copy of unemployment benefits. Complete Section B of this form for affected wage earner.</p>
<p><b>3. Reduction or Loss of Benefits:</b> Reduction or loss of child support, social security, unemployment compensation, alimony, untaxed retirement or disability pension, TANF, etc.</p>	<p>3. Include in Section B any child support, alimony, or life insurance payments expected in 2012.</p>
<p><b>4. Extraordinary Expenses:</b> Expenses incurred within the prior year (uninsured medical expenses, catastrophic event costs, additional travel/household expenses, etc.).</p>	<p>4. Provide a detailed letter of explanation of the situation and provide all supporting documentation, including copies of paid receipts or cancelled checks (NOT BILLS) showing expenses incurred.</p>
<p><b>5. One-time Income that occurred in 2011</b></p>	<p>5. Provide information on where funds came from and what they were used for.</p>

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**SECTION B: ANTICIPATED 2012 INCOME CALCULATION**

Please list in the tables below any anticipated income for the calendar year 2012. **Do not leave spaces blank, enter zero if necessary.** If a job change has occurred, report any wages earned prior to end of employment, severance package, unemployment compensation expected, and any additional wages from other work or other sources of income through December 31, 2012. Include copy of current pay stub if appropriate to document reduction in income.

<b>Expected Wages From Work In 2012:</b>	<b>Parent</b>
Wages earned from: January 1, 2012 to TODAY	\$
Wages expected from: TODAY to December 31, 2012	\$

<b>Other Taxable Income:</b>	<b>Parent</b>
Alimony	\$
Business or Farm Income	\$
IRA Distributions	\$
Pensions and Annuities	\$
Unemployment Compensation	\$
Taxable Social Security Benefits	\$
Other (Rentals, royalties, etc.)	\$

<b>Non-Taxable Income:</b>	<b>Parent/Student</b>
Welfare benefits, including TANF (do not include food stamps)	\$
Untaxed Social Security Benefits (such as SSI)	\$
Tax deferred pension and savings payments	\$
Child support received for all children	\$
Untaxed portions of IRA distributions (exclude rollovers)	\$
Untaxed portions of pensions (exclude rollovers)	\$
Living allowances for clergy, military and others	\$
Veterans non-education benefits	\$
Other untaxed income (workers compensation, disability, etc.)	\$
Money received or paid on your behalf (bills, gifts, etc.)	\$

**Be sure you did not leave blanks, enter zero if necessary.**

**SECTION C: SIGNATURES**

The information provided on this form is true and complete to the best of my knowledge. I agree to notify the Office of Financial Aid at Hobart and William Smith Colleges of any error, omission, or further circumstances that may affect the accuracy of the above information. I understand that failure to comply with this agreement could result in the forfeiture of financial aid eligibility for the student.

Parent \_\_\_\_\_ Date \_\_\_\_\_

**FA Office Use Only**

OGA \_\_\_\_\_ IGA \_\_\_\_\_ ILA \_\_\_\_\_

Comments \_\_\_\_\_