2023-2024 Special Circumstance Petition

Federal regulations **require** the Office of Student Financial Aid to use **2021 financial information** from the FAFSA when determining financial need for the **2023-2024 school year**. This form may be used if you feel that the FAFSA does not adequately reflect your financial condition for the **2023 tax year**.

Please complete all three sections of this petition with estimated 2023 family income and return it to the Office of Student Financial Aid with the required documentation. Please complete in blue or black ink.

NOTE: If documentation is not submitted with this petition, your request will not be processed.

Section 1: Student & Parent Information

_____	_____
Student Name (Last, First, M.I.)	Student ECU (Banner) ID
_____	_____
Student Spouse (Last, First, M.I.)	Parent/Stepparent Name (Last, First, M.I.)
_____	_____
Parent/Stepparent Name (Last, First, M.I.)	Parent and/or Student Phone Number

Section 2: (please check all that apply)

_____**Loss of job(s) or benefit income –** Student, spouse, or parent(s) has lost employment (due to layoff, termination, or involuntary resignation) since the last tax year reported on most recent FAFSA.

1. Who has lost earning? Name: _____ Relationship to student: _____
2. Dates of lost or reduced earnings: from _____ to _____
3. Benefit lost: _____ _____
   type amount
4. Requested Documentation:
   - Written explanation of situation including **estimate of 2023 family income.**
   - Evidence of loss of employment (termination notice or signed official letter from employer on company letterhead).
   - Evidence of loss of benefits (court decisions, letters of denial).
   - **Most recent copy of 2023 pay stubs.**
   - Copy of unemployment check(s) or pay stubs (or letter stating that unemployment was denied).
   - Copy of 2021 IRS Tax Return Transcript **OR** a signed copy of 2021 Income Tax Return and All Schedules completed, **AND** All W2s (**Parents and Student**).
   - Completed 2023-2024 Dependent or Independent Verification form.

_____**One-time nonrecurring income** – Student, spouse, or parent(s) received a one-time lump sum (such as inheritance, retirement, IRA distribution, etc.) that was reported on the 2023-2024 FAFSA but is not expected to reoccur in **2023**.

1. Who received the one-time income? Name: _____ Relationship to student: _____
2. Requested Documentation:
   - Written explanation of situation.
   - Official evidence of one-time income (legal forms, financial statements, etc.).
   - Signed statement that identifies the source of income and how the funds were spent or invested.
   - Copy of 2021 IRS Tax Return Transcript **OR** a signed copy of 2021 Income Tax Return and All Schedules completed, **AND** All W2s (**Parents and Student**).
   - Completed 2023-2024 Dependent or Independent Verification form.

_____**Separation or divorce of student or parent** – If student or your parents have separated or become divorced since the time the FAFSA was filed.

1. Date of divorce or separation: _____
2. Name of Primary (Custodial) Parent (after separation or divorce): _____

3. Number of family members remaining in household: _____ Number in college: _____
4. Total amount of child support received or expected to be received in **2023**: _____
5. Written estimate of **2023** family income, including **2023 pay stubs** of custodial parent.
6. Requested Documentation:
   - Legal documentation of separation or divorce (court decisions or divorce decree) or proof that parents (or student & spouse) are residing separately (copy of lease for house or apartment, utility bills, etc.).
   - Copy of 2021 IRS Tax Return Transcript **OR** a signed copy of 2021 Income Tax Return and All Schedules completed, **AND** All W2s (**Both Parents, including Stepparent(s), and Student**).
   - Completed 2023-2024 Dependent or Independent Verification form.

_____**Death –** Your spouse (or parent, if dependent) received income for the most recently reported tax year but passed away after you completed the FAFSA.

1. Date of death: _____
2. Name of deceased: _____ Relationship to student: _____
3. Number of family members remaining in household: _____ Number in college: _____
3. Requested Documentation:
   - Legal documentation of death (such as a copy of death certificate).
   - Copy of 2021 IRS Tax Return Transcript **OR** a signed copy of 2021 Income Tax Return and All Schedules completed, **AND** All W2s **(Both Parents and Student**).
   - Completed a 2023-2024 Dependent or Independent Verification form.

_____**Filing status –** You disagree with the definition of an Independent Student, as outlined by the U.S. Department of Education, as it applies to you. **Please note: living separately and NOT receiving monetary assistance from your parent(s) does not classify you as an Independent Student.**

Students requesting a change in filing status must submit **all of** the following documentation:

1. Acceptable Documentation:
   - Signed personal statement describing why you feel that you are independent of your parents and indicating your housing arrangements while school is in session and during breaks **AND**
   - **Three signed personal statements** from individuals not related to you (clergy, governmental agency, or school official such as counselor, principal, teacher – **not** friends, roommates or romantic partners) stating their personal knowledge of you being independent **AND**
   - Copies of 2021 IRS Tax Return Transcript **OR** a signed copy of 2021 Income Tax Return and All Schedules completed, **AND** All W2s (**Student**) **AND**
   - Completed 2023-2024 Independent Verification form **AND**
   - Submit a paper copy of the 2023-2024 Free Application for Federal Student Aid (FAFSA). A paper copy of the 2023-2024 FAFSA is available under the "Forms → 2023-24" page at https://financialaid.ecu.edu/.

_____**Other –** A catastrophic event affecting family income.

1. Requested Documentation:
   - Written explanation of situation, including estimate of **2023** family income.
   - Documentation regarding change
   - Copy of 2021 IRS Tax Return Transcript **OR** a signed copy of 2021 Income Tax Return and All Schedules completed, **AND** All W2s (**Parents and Student)**, including a copy of 2021 Schedule A of your Federal Tax return (if applicable).
   - Completed 2023-2024 Dependent or Independent Verification form.

Section 3: Certification Statement:

I/We certify that the information on this form is true, complete, and correct to the best of my/our knowledge. I/We understand that false statements or misrepresentations are cause for denial, reductions, withdrawals, and/or repayment of financial aid. I/We also understand that this information will be used in accordance with Federal guidelines and may or may not result in adjustments to the student's financial aid eligibility.

Student Signature Date	Student Spouse Signature Date
Parent/Stepparent Signature Date	Parent/Stepparent Signature Date

Due to Federal Privacy Regulations regarding email and the protection of your personal information, we urge you to send documents to our secure FAX at 252-328-4347 or mail all documents to Office of Student Financial Aid, MS510, East Carolina University, Greenville, NC 27858. For materials that may contain a social security number, please cover or remove all but the last four digits. For materials with the date of birth, please cover or remove the year. If you have any questions, please contact our office at 252-328-6610.