



**Scholarship and Financial Aid Office
Special Condition Form
2009-2010**

Students whose family experiences a change in financial circumstances that will lower family resources from 2008 to 2009 may be eligible for a recalculation of their aid eligibility based on estimated 2009 income. In order to be considered for a special condition calculation, students and their families must meet specific guidelines and **provide documentation of the change.**

NO DOCUMENTATION = NO ADJUSTMENT

All applicants must still complete the 2009-2010 Free Application for Federal Student Aid. This Special Condition Form is used to determine if the circumstances warrant an adjustment to your UDM financial aid award.

- 1) **Submit a letter** explaining the decrease of income. Be specific about the circumstances. Include dates, amounts, etc. Some examples of situations that warrant a re-evaluation include:

- Loss of employment for parent or student/spouse for 10 weeks or more. Overtime is excluded.
- Divorce or separation
- Death of parent or spouse
- Loss of untaxed income or benefit
- Illness/Disability
- Unusually high child-care costs (over \$1000/month; document)
- Unusual medical or dental expenses not covered by insurance

Tuition payments for siblings in kindergarten through 12th grade during January-December 2008.
(If this is your only special condition, you need to complete the Sibling Tuition Payment Form only. This form is available from the Financial Aid Office or on line at www.udmercy.edu/apply/financial_aid/forms.)

- 2) **Attach documentation.** For loss of job, a letter **from the employer** stating employment dates, total earnings, estimated pension, and/or severance pay amount. For separation or divorce, documentation from a court, attorney, minister (for annulment) is appropriate. Provide documentation of other situations as appropriate (doctor's certificate of disability, death certificate, tuition or medical bills or letters from school or doctor, etc.)
- 3) **Complete the 2009-2010 Verification Worksheet and provide a copy of your Federal tax return for 2008.**
- 4) **Estimate your total income for 2009** from all sources. Do not leave blank. **(Documentation Required)**

Annual Income	Parent/Spouse	Student
Income earned from work		
Interest and dividends		
Unemployment Compensation		
Alimony, Capital Gains		
Rents, Royalties, Partnerships, Estates, Trusts, Business/Farm Income		
Taxable portions of pensions, annuities, social security, RRTAs, early withdrawals from IRAs, etc.		
All other taxable income		
Untaxed income (social services benefits, earned income credit; worker's compensation; untaxed interest, dividends, capital gains, social security, RRTA, etc.; insurance settlements, 401(k) or 403(b) plans, child support, housing, food and living allowances, and all other untaxed income.		
Deductible IRA or Keogh payments		
Alimony or child support paid out		

Name of Student _____ SSN or Student No. _____ Date _____

Signatures:
Student: _____ Parent: _____