



2009-2010 SPECIAL CONDITIONS REVIEW FORM FOR THE INDEPENDENT STUDENT

Student's Name: _____ Warrior ID Number: _____

The Special Conditions Review Form is used to report changes in circumstances that occur after filing the Free Application for Federal Student Aid (FAFSA) or to report circumstances that affect the student's ability to contribute toward college costs. The WSU Student Financial Aid Office reviews information reported to determine whether changes can be made. Check the condition(s) that apply to you and complete the applicable questions on the back.

- _____ You worked full time in 2008, but you are not working full-time now. Please provide a copy of the last paycheck stub, and a list of any compensation or unemployment benefits. Please summarize the circumstances below and report the 2009 year expected income on page 2.
_____ Your spouse who had earnings from employment in 2008 has become unemployed in 2009. Please provide a copy of the last paycheck stub, a list of any compensation or unemployment benefits and a letter of lay-off or closure from employer. Beginning date of unemployment: _____. Please summarize the circumstances below and report your 2009 year expected income.
_____ You received a form of untaxed income or benefits in 2008 and have lost that income or benefit in 2009. Date of loss of income or benefit: _____. Please summarize the circumstances below and report the 2009 year expected income on page 2.
_____ You have already applied for financial aid, and since that time you and your spouse have gotten separated or divorced. Report your marital status and family size change on page 2. Also provide copies of your W2's and a copy of the separation or divorce papers. List the date of your separation or divorce: _____.
_____ You have already applied for financial aid and since that time your spouse has died. Please provide a list of life insurance policies and amounts that have been paid to date. Report your marital status and family size change on page 2. List the date of your spouse's death: _____.
_____ You had unusually high medical and/or dental expenses in 2008 that were not paid by insurance. These expenses should not include amounts covered by insurance, company health plans, self-employed health deductions or insurance premiums. Provide documentation such as cancelled checks or paid receipts. List the total amount of medical / dental expense paid in 2008: \$ _____.
_____ You paid elementary, junior high or senior high school tuition for your children in 2008. Do not include tuition for preschool or college. Don't include tuition paid by scholarships or other expenses such as room, board, books or transportation. Provide documentation such as cancelled checks or paid receipts. List the total amount of elementary, junior high and senior high school tuition paid in 2008: \$ _____.
_____ Income from the family farm was unusually high in 2008. Please provide copies of the previous five years tax returns.
_____ Please summarize other unusual circumstances, on a separate sheet of paper, that you believe may be applicable and provide documentation as appropriate.

Return form to:

Please summarize your special circumstances (use another sheet of paper if necessary):

Winona State University
Financial Aid Office
PO Box 5838
Winona, MN 55987
Phone: (507) 457-2800
or 1-800-342-5978
Fax: 1-507-457-5628
E-mail: financialaid@winona.edu

Four horizontal lines for summarizing special circumstances.



SPECIAL CONDITIONS REVIEW FORM – INDEPENDENT

If there is a change in student income please fill out this section.

	Received to date From 1/1/09-today	Still expected in 2009 From today to 12/31/09	Total for 2009: From 1/1/09-12/31/09
Student's/ spouse's 2009 estimated taxable income. This item should consist of the expected 2009 adjusted gross income:	\$	\$	\$
Student's 2009 expected earnings from work:	\$	\$	\$
Spouse's 2009 expected earnings from work:	\$	\$	\$
Student's/ spouse's 2009 expected untaxed income such as: Payments to tax-deferred pension/savings plan. Deductible IRA and/or Keogh payments. Child support received for all children. Welfare benefits (don't include food stamps). Untaxed portions of pensions. Social security payments received and not taxed. Worker's Compensation. Other untaxed income and benefits.	\$	\$	\$
Student's/ spouse's estimated payment of child support in 2009	\$	\$	\$
Student's/ spouses estimated Education Tax Credit on the Federal Tax return in 2009			\$

Complete the following items if the special circumstance being reported creates a change in the items.

- The special circumstance changes your marital status to: ____Divorced ____Separated ____Widowed
- The special circumstance has changed the family size to _____.
- The special circumstance has changed the number of family who are in college to _____.

The name of the Financial Aid Counselor that I talked with about my special conditions review was _____.

I certify that the information contained in this appeal, including any supporting documentation, is accurate and true to the extent of my knowledge and belief.

Student Signature

Date

Spouse signature (if applicable)

Date

VERIFICATION

The following documents are needed to enable us to complete your special conditions review:

_____ 2009-2010 Independent Student Verification Worksheet

_____ Student's 2008 Federal tax return with W2's

_____ Spouse's 2008 Federal tax return with W2's

2/2009