

**Queens University of Charlotte**  
**Office of Student Financial Services**  
**2009-10 Special Circumstances Application for Independent Students**

Student Name \_\_\_\_\_ Student ID \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_ Email \_\_\_\_\_

If your 2009 income will be significantly less than the 2008 income reported on your FAFSA, you can complete this form and return it to Student Financial Services for further consideration of your 2009-10 financial aid.

In order to verify your 2008 financial information, please submit the items listed below along with this completed form.

- 2009-10 Verification Worksheet for Independent Students
- Signed copy of student's and/or spouse's 2008 Federal Income Tax Return

Please review the sections below and complete the explanation that best applies to your 2009 reduction in income. Submit all documentation associated with the selected explanation.

**You and your spouse have separated/divorced since you filed the FAFSA**

Date of change \_\_\_\_\_

- Copy of your and/or spouse's 2008 W-2 Forms

**Death of spouse since you filed the FAFSA**

Date of change \_\_\_\_\_

- Copy of spouse's death certification or obituary
- Copy of your and/or spouse's 2008 W-2 Forms

**Permanent and total disability of you or spouse since student filed the FAFSA**

Date of change \_\_\_\_\_  self  spouse

- Attending doctor's statement of disability
- Documentation of date disability resulted in termination of employment
- Documentation of employer disability payments
- Notification of workers' compensation
- Copy of most recent pay stubs or statement of earnings to date for all 2009 employment of both you and your spouse
- Documentation of all other sources of income (taxable and non-taxable)

**Employment changed due to job loss, job reduction, or retirement**

Date of change \_\_\_\_\_  self  spouse

Reason for change \_\_\_\_\_

- Employer's notice and/or written documentation of termination/cessation
- Copy of most recent pay stubs or statement of earnings to date for all 2009 employment of both you and your spouse
- Notice of application for unemployment compensation and amount received
- Documentation of all other sources of income (taxable and non-taxable)

**Loss of Benefits**

**Social Security, Disability, or Welfare Benefits**

Date of change \_\_\_\_\_  self  spouse

- Benefit provider's notification to you of loss of benefit
- Copy of most recent pay stubs or statement of earnings to date for all 2009 employment of both you and your spouse
- Documentation of all other sources of income (taxable and non-taxable)

**Child Support and/or Alimony**

Date of change \_\_\_\_\_

- Court documents verifying loss and date/conditions of loss
- Copy of most recent pay stubs or statement of earnings to date for all 2009 employment
- Proof of child support received in 2008 and 2009
- Documentation of all other sources of income (taxable and non-taxable)

**Worker's Compensation**

Date of change \_\_\_\_\_

- Letter from Bureau of Worker's Compensation stating termination date of benefits
- Copy of most recent pay stubs or statement of earnings to date for all 2009 employment of both you and your spouse
- Documentation of all other sources of income (taxable and non-taxable)

**Unusual Medical/Dental Expenses**

- Statements from medical providers showing amounts **paid** by student and spouse in 2008 and 2009.

**Other**

Use the area below to provide a written explanation detailing all reasons your family's 2009 income will be reduced, or attach a letter of explanation.

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**Please complete page 3 before signing below.**

**Certification Statement**

I certify that all of the information contained in this application is true to the best of my knowledge. I understand that failure to provide the required documentation may result in denial of this application.

\_\_\_\_\_  
Student's signature

\_\_\_\_\_  
Date

Student Name: \_\_\_\_\_

Complete all sections below with income (prior to exemptions, adjustments, or deductions) that your family received from January 1, 2009 to the present and expects to receive from present until December 31, 2009.

Provide documentation for all items you list below.

2009 Gross Taxed Income	Student's Income		Spouse's Income	
	Actual to date	Projected	Actual to date	Projected
Wages, salaries, tips				
Severance pay				
Interest and dividend income				
Taxable refunds, credits, or offets of state and local income taxes				
Alimony received				
Business or farm income				
Capital gains				
IRA distributions				
Pensions and annuities				
Rental real estate, royalties, partnerships, S corporations, trusts				
Unemployment compensation				
Social security benefits that were taxed				
Any other taxed income				
<b>Total 2009 Gross Taxed Income</b>				

2009 Untaxed Income	Student's Income		Spouse's Income	
	Actual to date	Projected	Actual to date	Projected
Payments to tax-deferred pension and savings plans				
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans				
Child support received for all children				
Tax exempt interest income				
Untaxed portion of IRA distributions				
Untaxed portion of pensions				
Credit for federal tax on special fuels				
Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)				
Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances				
Any other untaxed income or benefits not reported elsewhere, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, Refugee Assistance, etc.				
Cash received, or any money paid on your behalf, not reported elsewhere on this form				
<b>Total 2009 Untaxed Income</b>				