

2023-2024 Request for Review of Special Conditions (Self-Supporting Independent Students)

Use this form to request Student Financial Aid (SFA) to review significant changes in you and/or your spouse's income and resources that occur during the 2022 or 2023 tax year. You must file the 2023-2024 Free Application for Federal Student Aid **BEFORE** you complete this form. You may submit this form at any time after you receive a valid 2023-2024 Student Aid Report, but this request must be submitted along with acceptable documentation no later than 60 days before your last date of attendance during 2023-2024 (Fall 2023, Spring 2024, Summer 2024). **A recalculation in financial need does not guarantee that additional aid will be awarded. All required documents must be submitted at the same time. We will not accept partial or incomplete documents.** Final decisions will be posted on your UNA portal.

Student _____ L# _____ Phone# _____

Provide a written summary explaining how the circumstances that will adversely affect your ability to pay for educational expenses at UNA from your 2021 income or resources. Some examples of special circumstances include, but are not limited to, the following:

- If you presently have no income, how are you meeting the basic necessities of life, i.e., housing, food, clothing, transportation? Provide an annual value for the benefits being provided to you.
- If your current income has been substantially reduced from the year before, how are you meeting the basic necessities of life, i.e., housing, food, clothing, transportation?
- Are you living with someone who is providing to you the basic necessities of life? Explain and provide a value for the benefits being provided to you.
- Unusually large medical expenses NOT PAID BY MEDICAL INSURANCE. We will consider the amounts **YOU ACTUALLY PAID**, not the amount you owe to the doctor(s) and hospital(s).
- If you received a lump-sum settlement from a retirement account or inheritance and you spent the money for the basic necessities of life, please explain. We may or may not make an adjustment to your eligibility for Federal Student Aid on the basis of the money you spent from the settlement.
- If you have experienced a marital separation that caused a substantial reduction in your household income, please explain. Provide a copy of the separation agreement.
- If you have suffered personal financial losses as a result of wind storms, fire, floods or other natural disasters that were not covered by insurance, please explain. Provide a copy of the insurance claim form or accident report.
- If the death of your spouse caused a substantial reduction in your household income, please explain. Provide a copy of the death certificate.
- If you or your spouse, if you are married, have suffered an accident on the job that caused a substantial reduction in the household income, please explain and provide a copy of the accident report or employer statement detailing the period of your absence.

Please Note:

We will not make adjustments or recalculations to Federal Student Aid on the basis of recurring costs such as utilities, credit card expenses, allowances to children, mortgage payments, vehicle payments, tuition for private school, medical costs you owe, and other lifestyle expenses which you choose.

Acceptable Documentation

a recent paycheck stub which includes 2022 or 2023 year-to-date earnings
a recent statement from employer of 2022 or 2023 year-to-date earnings
a statement from agency (i.e., Social Security) of 2022 or 2023 benefits
a signed copy of your 2022 U.S. Income Tax Return or Transcripts and W2s

A hand-written signature must be provided.

Student Signature _____ Date _____

Submit this worksheet and all other documentation to:

UNA Student Financial Aid, UNA Box 5014, Commons Building, Florence AL 35632,
by Email to financialaid@una.edu, or by fax to 256-765-4920.