

**TEXAS A&M UNIVERSITY - COMMERCE**  
**OFFICE OF FINANCIAL AID and SCHOLARSHIPS**  
**2008-2009 SPECIAL CIRCUMSTANCES APPLICATION**

**Complete the application, provide signed copies of yours and/or your parent's 2007 tax returns, complete a 2008-2009 Verification Worksheet Form, and return all documentation to the Office of Financial Aid.**

**Student's Name:** \_\_\_\_\_ **Campus Wide ID:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **Local Phone #:** \_\_\_\_\_  
\_\_\_\_\_

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**Loss or reduction of income from work:** Please check the circumstance that best applies to your situation and complete the Income Worksheet on page 3 of this form.

- Termination** Provide an official letter from employer stating the effective date of termination. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer's statement, etc.) and signed copies of your (Independent) or your parent's (Dependent) 2007 tax return.
- Disability** Attach medical documentation of disability and the effective date. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer's statement, etc.) and signed copies of your (Independent) or your parent's (Dependent) 2007 tax return.
- Layoff** Provide an official letter from employer stating the effective date of the layoff and anticipated return. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer's statement, etc.) and signed copies of your (Independent) or your parent's (Dependent) 2007 tax return.
- Reduced Employment** Provide an official letter from employer stating the effective date. In addition, you must provide official documentation of earnings to date with this application (final pay stub, employer's statement, etc.) and signed copies of your (Independent) or your parent's (Dependent) 2007 tax return. **Note:** quitting your job or reducing your hours to attend school is not considered a special circumstance.
- Divorce/Separation:** Complete the Income Worksheet on page 3 of this form. Since applying for financial aid, you and your spouse (I) or your parent=s (D) have become divorced or separated. Provide legal documentation containing the date of the divorce or separation, copy (ies) of 2007 W-2 (s) and a signed copy of 2007 federal tax return.
- Death of Spouse/Parent:** Complete the Income Worksheet on page 3 of this form. Since applying for financial aid, your spouse (I) or a parent (D) is no longer living. Provide documentation of the date of death, copy(ies) of 2007 W-2 (s) and a signed copy of 2007 federal tax return.

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**One-Time Income:**

Complete the Income Worksheet on page 3 of this form. In 2007, you and your spouse (I) or your parents (D) received a one-time source of income such as: inheritance, moving expense allowance, back-year social security payments, severance pay package, IRA distribution, etc. Provide a signed copy of 2007 tax return indicating moving expenses, IRA distribution, etc., or documentation from the Social Security Administration for back-year payments. **Note:** *Winnings from gambling are not considered a special circumstance.*

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List the one-time source of income

**Elementary/Secondary Education and Adult Care Expenses**

Provide documentation for each family member you included in your family size on your application for financial aid for whom you (I) or your parents (D) paid tuition/fees for private elementary/secondary education, or adult care expenses. Documentation required: Signed 2007 tax return (to verify dependents) and receipts for tuition or adult care payments made in 2007.

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Name of Family Member

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Relationship to Student

**Include Parents in the Number in College (Dependent Students Only)**

Your parents cannot automatically be included in the number in college. If your parents are pursuing an undergraduate or graduate degree, an adjustment to your financial aid application can be made. Provide a signed copy of parent's degree plan from the school or university they are attending or a copy of their academic transcript.

**Unusually High Medical/Dental Expenses:**

**Note:** Medical/dental expenses up to 11% of the family's total income are already taken into account by the Federal Needs Analysis Formula when determining financial aid eligibility. Therefore, *only the portion of expenses which exceed 11% will be considered an unusual circumstance.*

If you or your spouse (I) or your parents (D) itemized medical/dental expenses in 2007, provide a signed copy of the 2007 tax return, including Schedule A. If medical/dental expenses were not itemized in 2007, provide receipts of medical/dental expenses paid in 2007 and prepare a Schedule A using that information.

List below the family member for whom medial/dental expenses were incurred in 2007:

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Name of Family Member

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Relationship to Student

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**SUMMARY OF SPECIAL CIRCUMSTANCES**

**Please summarize your special circumstances. Use back of form if additional space is needed.**

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**2008 Income Worksheet**

*Do not leave any blanks - worksheet must be completed.*

Source: <b>You must provide documentation of ALL sources of income, (ex. last pay stub, statement from employer, Social Security statement, etc.)</b>	<b>ACTUAL 1/08/08 – Today</b>	<b>ESTIMATED Today – 12/31/08</b>	<b>TOTAL ACTUAL + ESTIMATED</b>
Expected 2008 income earned from work by <b>student</b>			
Expected 2008 income earned from work by <b>spouse (for independent students).</b>			
Expected 2008 income earned from work by <b>father (for dependent students).</b>			
Expected 2008 income earned from work by <b>mother (for dependent students).</b>			
Other taxable income: Include dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.			
Social Security Benefits			
Temporary Assistance to Needy Families (TANF)			
Child Support			
Other untaxed income: welfare benefits, earned income credit, etc.			
<b><i>TOTAL Estimated 2008 INCOME</i></b>			

