LESLEY UNIVERSITY

FINANCIAL AID
Special Conditions Request
2012-2013

A Congressionally mandated needs analysis formula is utilized to determine a student's (and parent's when applicable) educational contribution or Expected Family Contribution (EFC). A student's EFC is based on the most recent calendar year a federal tax return was filed. (For the 2012-2013 academic year, the calendar year used to file taxes is January 1, 2011 to December 31, 2011. This calendar year is also called the base year.) These financial figures are reported on the Free Application for Federal Student Aid (FASFA).

Lesley University Office of Financial Aid recognizes the needs analysis formula may not accurately reflect *unexpected* financial circumstances encountered after the conclusion of the base year. At the request of the student, the Office of Financial Aid will review a reported financial change to determine if adjustments should be made to the calculation of a student's EFC which *may* impact the student's financial aid eligibility.

Definition of a Special Condition- A Special Condition is an *unexpected* marked change in a student's and/or family's financial situation as compared to the base year/information reported on the 2012-2013 FAFSA.

Conditions that *Do Not* Qualify-

- Expenses a student and/or family has been paying regularly; i.e. on-going medical expenses, revolving debt such as credit cards, bank, educational loans, automobile, etc.
- Expenses that are expected; i.e. weddings, more than one dependent child enrolled in college, the retirement of a wage earner, a student's social security benefits ended at the age of 18, etc.
- A student or parent has decided to quit or reduce his/her employment to attend Lesley University.
- One-time income situations; i.e. the sale of a house, an inheritance, lottery winnings, or severance payment.

Special Conditions Must Be Fully Documented- US Department of Education policy requires that Special Conditions fall within certain parameters and be substantiated through documentation. The Office of Financial Aid has the legal authority to require you to submit supporting documentation verifying claims reported on your Special Conditions Request, such as, but not limited to, letters from employers or insurance companies, receipts, etc.

No Guarantee- Reporting a Special Condition does not guarantee a recalculation of a student's EFC and/or an increase in financial aid funding. All cases will be reviewed by the Office of Financial Aid upon receipt of all required documentation, which may determine that the Special Condition reported does not comply with the spirit of the US Department of Education's regulations governing financial aid programs. *All decisions made by the Office of Financial Aid are final.*

Notification- Special Condition Forms may take several weeks to review, which is contingent upon the receipt of all required documentation. The Office of Financial Aid will review and process requests and mail written confirmation of approval or denial. If a change in a student's financial aid eligibility occurs due to his/her request, a revised Financial Aid Award Letter will be mailed.

Directions

1. **Appeal Letter-** Please submit a one page letter explaining your Special Condition. Keep your Appeal Letter brief and *concentrate on financial matters*. Unfortunately, exceptional academic achievement or the ability to overcome adversity has no influence in determining a student's EFC.
2. **Complete both sides of the Special Conditions Request-** *Dependent* students must complete both student and parent sections, and have at least one parent sign his/her form.
3. **Provide Documentation of your Special Condition-** The specificity of documentation depends on the condition itself. The more specific the financial documentation, the more persuasive the appeal. Appeals without official financial documentation will be rejected by the Office of Financial Aid.
4. **Return** your Appeal Letter and Special Conditions Request to: Lesley University Office of Financial Aid, Attention: _____, 29 Everett St., Cambridge, MA 02138-2790.

LESLEY UNIVERSITY

FINANCIAL AID
Special Conditions Request
2012-2013

A. Student Information

_____ _____ OR xxx-xx-_____

Last Name (Please Print) First Name Middle Initial Lesley ID# Last 4 digits of Soc Sec No.

B. Special Condition

Indicate the Special Condition that applies to your situation with a "√ " and attach ***all*** of the required documentation indicated.

All Special Condition Forms must be accompanied by copies of the student's 2011 Tax Return Transcript. If the student is DEPENDENT, a copy of the parent(s)' 2011 Tax Return Transcript is required. If the student is married, a copy of the spouse's 2011 Tax Return Transcript is required.

SPECIAL CONDITION	INDIVIDUAL AFFECTED	DEPENDENT STUDENT SCENARIO	INDEPENDENT STUDENT SCENARIO	REQUIRED DOCUMENTATION
☐ Loss of Employment	Name of Individual Affected: _____ Relationship to Student: _____	Your 2012 income earned, or your parent(s)' 2012 income earned will be less than income earned in 2011	Your 2012 income earned and/or your spouse's 2012 income earned (if applicable) will be less than income earned in 2011	√ 2011 Tax Return Transcript √ Last pay-stub indicating year-to-date earnings √ Employer termination notice √ Employer benefit notice
☐ Loss of Taxable or Untaxed Income ➢ Child Support ➢ Social Security ➢ Worker's Compensation ➢ Alimony ➢ Other- *Explain in Appeal Letter*	Name of Individual Affected: _____ Relationship to Student: _____	You or your parent(s)' received benefits in 2011 which have ceased or will be dramatically reduced for 2012	You and/or your spouse (if applicable) received benefits in 2011 which have ceased or will be dramatically reduced for 2012	√ 2011 Tax Return Transcript √ Documentation from agency verifying 2011 benefits received √ Documentation from agency verifying 2012 benefit eligibility √ Agency benefit termination letter
☐ Death of a Parent or Spouse	Name of Individual Affected: _____ Relationship to Student: _____	One of your parents has died *AFTER* filing your 2012-2013 FAFSA	Your spouse has died *AFTER* filing your 2012-2013 FAFSA	√ 2011 Tax Return Transcript √ Death certificate
☐ Medical Expense(s)	Name of Individual Affected: _____ Relationship to Student: _____	Your medical expenses or your parent(s)' medical expenses were not covered by medical insurance	Your medical expenses or your spouse's medical expenses were not covered by medical insurance	√ 2011 Tax Return Transcript √ Proof of Medical Bill Expense √ Insurance Company letter verifying medical bill(s) are not covered under your policy

C. Changes in Family Size and/or Number in College

If your family size or the number of people in your family enrolled in college has changed *AFTER* filing your 2012-2013 FAFSA, please complete this section. *List all family members living in your household.*

Name of Family Member	Relationship to Student	Age	College Enrollment for 2012-2013 *subject to verification	Will Enroll at Least Half-Time? Yes	No	Expected Year of Graduation
1. *Student Applicant's Name:* _____	*Self*	_____	*Lesley University*	_____	_____	_____
2.						
3.						
4.						
5.						
6.						

D. Student's and Spouse's Income

⇒ If you (student) or your spouse (if applicable) report a loss of employment/reduction in wages report the following:

	STUDENT	SPOUSE
2011- Number of Weeks of Work:		
2011- Hours per Week:		
2012- Beginning and Ending Dates of Employment:		

⇒ Report your (student) and your spouse's (if applicable) 2011 income and total 2012 projected income below:

SOURCE OF INCOME	2011 INCOME Refer to 2011 Federal 1040 *or* applicable docs.	ACTUAL INCOME 1/1/2012 to Date *or* 1/1/2012 to 12/31/12	ESTIMATED INCOME To Date through 12/31/2012 *If applicable*	*PROJECTED 2012 INCOME* (Actual Income + Estimated Income)
Adjusted Gross Income				
Student's Wages				
Spouse's Wages				
Unemployment Benefits				
Worker's Compensation				
Income Tax Paid				
Earned Income Credit				
Social Security Benefits				
AFDC/ADC Benefits				
Child Support Received				
Other Untaxed Income				

E. Parent(s)' Income

⇒ If your parent(s) report a loss of employment/reduction in wages report the following:

	FATHER	MOTHER
2011- Number of Weeks of Work:		
2011- Hours per Week:		
2012- Beginning and Ending Dates of Employment:		

⇒If you (student) are *DEPENDENT*, report your parent's 2011 income and total 2012 projected income below:

SOURCE OF INCOME	2011 INCOME Refer to 2011 Federal 1040 *or* applicable docs.	ACTUAL INCOME 1/1/2012 to Date *or* 1/1/2012 to 12/31/12	ESTIMATED INCOME To Date through 12/31/2012 *If applicable*	*PROJECTED 2012 INCOME* (Actual Income + Estimated Income)
Adjusted Gross Income				
Father's Wages				
Mother's Wages				
Unemployment Benefits				
Worker's Compensation				
Income Tax Paid				
Earned Income Credit				
Social Security Benefits				
AFDC/ADC Benefits				
Child Support Received				
Other Untaxed Income				

F. Certification

By signing this form, I (we) certify all information reported to the Office of Financial Aid is complete and accurate.
If you (student) are DEPENDENT, at least one parent must sign this form.

Student's Signature _____ Date

Parent's Signature _____ Date