

Reach University Office of Financial Aid

2023-2024 Professional Judgment Appeal (General)

Federal regulations require the Office of Financial Aid to use financial information from the FAFSA when determining financial need for each academic school year. This form may be used if you feel that the FAFSA does not adequately reflect your financial condition.

Please return this form to the Office of Financial Aid (finaid@reach.edu) with all requested documentation. If documentation is not submitted with this appeal, your request will not be processed.

For many situations copies of the student's and/or parent(s)' federal taxes are required. You may submit a **signed** copy the tax return(s) or you may request an IRS Return Transcript free of charge from the IRS at www.irs.gov or via telephone by calling the IRS at 1-800-908-9946.

Student & Parent Information

Student Name (Last, First, M.I.)

Student ID #

Parent/Stepparent Name (Last, First, M.I.)

Parent and/or Student Address

Parent/Stepparent Name (Last, First, M.I.)

Parent and/or Student Phone Number

Possible Circumstances (complete all that apply)

_____ **Decrease of Income in 2022** – The household's 2022 income is significantly less than the 2021 income originally reported on the FAFSA.

Requested Documentation:

- Copies of parent(s)' and/or student's 2022 Federal taxes, along with copies of parent(s)' and/or student's 2022 W-2 form(s).

_____ **Occurrence of one-time income** – Student, spouse, or parent(s) received a one-time lump sum (such as inheritance, retirement, IRA distribution, etc.) that was reported on the FAFSA but is not expected in the future.

Who received the one-time income? Name: _____ Relation to student: _____

Requested Documentation:

- Official evidence of one-time income (legal forms, financial statements, etc.)
- Signed statement that identifies the source of income and how the funds were spent or invested
- Documentation supporting how the funds were spent or invested
- Copies of parent(s)' and/or student's 2021 Federal taxes, along with copies of parent(s)' and/or student's 2021 W-2 form(s).

_____ **Marriage of Student** – Student has married since the time the FAFSA was filed.

1. Date of marriage: _____

2. Number of family members now in household: _____ Number in college: _____

3. Requested Documentation:

- Legal documentation of marriage (marriage license and new SS-card with name change, if applicable)
- Copies of student and spouse's 2021 Federal taxes, along with copies of student and spouse's 2021 W-2 form(s)

_____ **Separation or divorce** – Student (or parents, if student is dependent) have separated or become divorced since the time the FAFSA was filed.

1. Date of divorce or separation: _____
2. Name of Primary (Custodial) Parent (after separation or divorce): _____
3. Number of family members now in household: _____ Number in college: _____
4. Requested Documentation:
 - Legal documentation of separation or divorce (such as court decisions or divorce decree) **AND**
 - Copies of parent(s)' and/or student's 2021 Federal taxes, along with copies of parent(s)' and/or student's 2021 W-2 form(s). If your parent has remarried, you must include a copy of your stepparent's 2021 Federal taxes.

_____ **Death** – Your parent (or spouse) received income in 2021, but passed away after you completed the FAFSA.

1. Date of death: _____
2. Name of deceased: _____ Relation to student: _____
3. Number of family members now in household: _____ Number in college: _____
4. Requested Documentation:
 - Legal documentation of death (such as a copy of death certificate) **AND**
 - Copies of parent(s)' (or spouse's) and student's 2021 Federal taxes, along with copies of parent(s)' and/or student's 2021 W-2 form(s)

_____ **Elementary or secondary tuition costs** – You or your parents are paying elementary and secondary tuition costs during the 2023-2024 school year for dependent children.

1. Requested Documentation:
 - Copies of parent(s)' and student's 2021 Federal taxes, along with copies of parent(s)' and/or student's 2021 W-2 form(s)
 - Contract or billing statement that states the amount of tuition paid or due for the 2023-2024 school year **OR**
 - Signed letter from the school stating the amount of tuition paid or due for the 2023-2024 school year on official school letterhead

_____ **Medical or dental expenses** – Paid out-of-pocket medical or dental expenses not covered by insurance that exceeds 10% of your income during 2022.

1. Requested Documentation:
 - Copies of parent(s)' and/or student's 2022 Federal taxes, along with copies of parent(s)' and/or student's 2022 W-2 form(s)
 - Copies of canceled checks used to pay out-of-pocket medical or dental expenses **AND/OR**
 - Confirmation of **out-of-pocket amount paid by you** during 2022 and purpose of expense. Amounts not paid cannot be considered.

Certification Statement

I/we certify that the information on this form is true, complete, and correct to the best of my/our knowledge. I/we understand that false statements or misrepresentations are cause for denial, reductions, withdrawals, and/or repayment of financial aid. I/we also understand that this information will be used in accordance with Federal guidelines and may or may not result in adjustments to the student's financial aid eligibility.

Student's signature

Date

Parent's signature

Date