



Student Name

LMU ID

Students whose family experienced a change in financial circumstances separate from what was reported on the FAFSA may be eligible for a recalculation of their federal, state, or institutional aid eligibility based on 2019 income or estimated 2020 income. In order to be considered for a special circumstances calculation, students and their families must meet specific guidelines and provide documentation of the change.

Submission of an appeal does not guarantee an increase to the financial aid award. Further, an approved appeal may only result in an increase to federal or state aid programs. In most cases, changes will result in additional employment and/or loan eligibility.

Incomplete requests will not be considered.

Section I - Appeal Reason(s):

Required Documentation:

- Complete the Free Application for Federal Student Aid (FAFSA)
- Submit a 1 page letter detailing the reason for submitting the appeal
- We will request parent and/or student tax data, if necessary, via the student's PROWL account or applicant portal
- Provide documentation supporting your special circumstance

Complete the section below and Section II on pages 2-3. Include supporting documentation such as a termination letter, severance benefit statement, unemployment benefit statement, recent pay stub documenting a change in job, copy of divorce decree, etc.

A. Reduced Income Due To:

- | | | | |
|---|------------------------------------|--|-------------------------------------|
| <input type="checkbox"/> Unemployment | <input type="checkbox"/> Parent(s) | <input type="checkbox"/> Student and/or spouse | Date occurred: <input type="text"/> |
| <input type="checkbox"/> Divorce or Separation
(after 2018 calendar year) | <input type="checkbox"/> Parent(s) | <input type="checkbox"/> Student and/or spouse | Date occurred: <input type="text"/> |
| <input type="checkbox"/> Other reduction in income
(e.g. change in employment) | <input type="checkbox"/> Parent(s) | <input type="checkbox"/> Student and/or spouse | Date occurred: <input type="text"/> |

B. Medical Expenses:

Parent(s) Student and/or spouse Date occurred:

Uninsured (out of pocket) medical/dental expenses: Paid in 2019 \$ **OR** Paid in 2018 \$

Provide documentation such as (a) a copy of 1040 if medical/dental expenses were itemized; or (b) an itemization of medical/dental expenses with total and attach receipts or statements of out of pocket payments. Total must exceed 11% of total income.

C. Private Elementary/ Secondary Tuition Expenses:

Tuition expenses paid for student's younger siblings: Paid in 2019 \$ **OR** Paid in 2018 \$

List below the names, ages and school for each child where tuition expenses were paid. Provide documentation such as receipts or statement from school stating total amounts paid.

Sibling Name	Age	School Name

Other Expenses (please explain):

Other Appeal Reasons



2020-2021 FINANCIAL AID APPEAL FORM

Please use black or blue ink while filling out this form.

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Section II - Provide either 2019 Actual Income or 2020 Projected Income. The Financial Aid Office may request supporting tax information from you via the student's PROWL account or applicant portal--If income for a section is 0, enter 0; do not leave blank.

- Actual 2019 Income (TAXABLE INCOME EARNED FROM JANUARY 1, 2019 THROUGH DECEMBER 31, 2019) for Student and/or Spouse, Parent 1 and/or Parent 2.
- Projected 2020 Income (TAXABLE INCOME EXPECTED TO BE EARNED FROM JANUARY 1, 2020 THROUGH DECEMBER 31, 2020) for Student and/or Spouse, Parent 1 and/or Parent 2.

	Student and/or spouse	Parent 1 (Father/ Stepfather)	Parent 2 (Mother/ Stepmother)
1. Wages	\$	\$	\$
2. Severance Compensation	\$	\$	\$
3. Unemployment Benefits	\$	\$	\$
4. Interest/Dividend Income	\$	\$	\$
5. Other Taxable Income ¹	\$	\$	\$
Total (1-5)	\$	\$	\$

	Student and/or spouse	Parent 1	Parent 2
1. Tax Deferred Payment to Retirement	\$	\$	\$
2. IRA/ Keogh Deduction	\$	\$	\$
3. Child Support Received	\$	\$	\$
4. Tax Exempt Interest	\$	\$	\$
5. Untaxed IRA Distribution (exclude rollover)	\$	\$	\$
6. Untaxed Pension	\$	\$	\$
7. Other Untaxed Income ²	\$	\$	\$
Total (1-7)	\$	\$	\$

¹ Must include business income/wages, capital gains, taxable pension and annuities, rental income, royalties, partnerships, S corporations, trusts, alimony, farm income, taxable IRA distributions and social security benefits, etc.

² Must include deductions and payments to self-employed SEP, SIMPLE, Keogh, etc., tax exempt interest and dividends, untaxed portions of IRA distributions (exclude rollovers), untaxed pensions, housing, food, and other living allowances (Clergy, etc.), veterans noneducational benefits, workers compensation, disability payments, unofficial spousal support, etc.



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Section III - STUDENT/PARENT CERTIFICATION:

SIGNATURE REQUIRED BY STUDENT (AND PARENT, IF STUDENT IS DEPENDENT)

I/We understand that the submission of an appeal does not release the student from the obligation of any current payment plan with Loyola Marymount University.

I/We understand that as there is no guarantee that an appeal will be approved.

I/We affirm that the information provided on this form and attached documentation is accurate and complete to the best of our knowledge. I/We also understand that any revision based on this appeal information does not guarantee the same adjustments will be made in future semesters and/or academic years.

Student Name

Student Signature _____

Date

Parent Name

Parent Signature _____

Date

Parent Email

Print Form

Phone: 310.338.2753

Fax: 310.338.2793

**Mail: ATTN: APPEALS COMMITTEE
LMU Financial Aid Office
1 LMU Drive, Suite 270
Los Angeles, CA 90045**

How to Submit this Form:

The Department of Education requires that documents containing personally identifiable information (PII) must be transmitted through secure means. This form cannot be submitted via email. You may mail or fax this form to the address or fax number listed to the left, or you may submit it as a PDF through our Secure Upload page available at financialaid.lmu.edu/upload

For Office Use Only:
RRAAREQ - APEAL at C or I
Retrieve - Appeal/Special
Circumstance

FAO Staff Initial _____
Date: _____

Providing the LMU Financial Aid Office with false information may result in a referral to the Office of Judicial Affairs and the U.S. Department of Education Inspector General. Violations of the Student Conduct Code are adjudicated according to the LMU Student Conduct Code found in the Community Standards.

WARNING: If you purposely provide false or misleading information, you will be reported to the U.S. Department of Education where you may be fined, sent to prison or both. All forms and paperwork are property of Loyola Marymount University and will be kept and maintain with student's file.