

You have indicated you wish to appeal for additional financial aid for the 2011-12 academic year based upon unusual circumstances. Aside from completing this form, you must also submit a Verification Form and tax returns for all individuals whose financial data appears on the financial aid application. (If you previously submitted a Verification Form and tax returns, you do not need to submit again.)

Most appeals, if accepted, will result in an increase in need-based self-help assistance such as subsidized loans and work. In some cases, there may be an increase in gift assistance. Students are expected to utilize full federal loan eligibility prior to being considered for or receiving additional Concordia gift assistance based on an appeal.

If your family circumstances are not of a severe, long-term nature, you may wish to visit with a financial aid adviser regarding loan programs such as the Federal Direct loan, PLUS loan, or private loan programs.

Student Information

Name _____ Concordia ID (9 digit) _____

Appeal Reason

Generally, circumstances that will result in an increase in financial aid are those that are severe in nature and beyond the control of the family. Check the appropriate reason for the appeal and **be sure to provide an explanation in the box at the bottom of the form or attach a separate document.**

- If you are appealing based on extraordinary medical expenses, please briefly itemize 2010 or 2011 out-of-pocket medical and dental expenses (those not covered by insurance or reimbursed through any other source). These expenses (including insurance premiums) must exceed 4% of 2010 adjusted gross income.
- If you are appealing based on tuition expenses at elementary or secondary school, please itemize current academic year elementary, junior high, and high school tuition to be paid for dependent children (other than applicant) and include documentation such as a statement from the school.
- If you are appealing based on significantly reduced parental income, please project parents' income from all sources on the back of this form and explain reason in box below.
- If you are appealing based on your significantly reduced income, please project your income from all sources on the back of this form.
- If you are appealing because one of your parents recently died, please contact the Financial Aid Office.
- If you are appealing for any other reason not listed above, please provide very specific information.

Explanation of Circumstances

Please briefly explain unusual circumstances:

Projection of Income

If you are projecting income, please provide estimated income from all sources for one of the following time frames.

If you lost your job prior to 2011, project income from all sources for 2011.

If you have just lost your job, select a 12-month period starting with the month you lost your job.

Please first fill in the 12-month period you will be projecting, such as April 1, 2011 to March 28, 2012. Starting Date _____ Ending Date _____

Please include all items that will appear on your tax return such as those indicated below (look at your most recent tax return to determine possible items). Be sure to also project your spouse's income for the same time frame. If you have filed for unemployment, be sure to attach a form from the state unemployment office certifying your eligibility. Also include any severance you have or will receive.

Parent Information

Taxable Income (to be reported on tax return)

Mother's wages \$ _____
Father's wages \$ _____
Interest/dividend income \$ _____
Severance compensation \$ _____
Business Income (or loss) \$ _____
Capital gains (or loss) \$ _____
IRA/pension distribution \$ _____
Income from line 17 of 1040 \$ _____
Farm income (or loss) \$ _____
Unemployment compensation \$ _____
W-2 form, box 12 \$ _____
codes D-H and S _____
Social security benefits (taxable) \$ _____
Any other taxable income \$ _____
Source _____ \$ _____

2011 Untaxed Income

Housing allowance for clergy (or value of parsonage) \$ _____
Workers compensation \$ _____
Child support \$ _____
Any other untaxed income \$ _____
Source _____ \$ _____

Unemployment Dates

From _____ To _____

Is this unemployment seasonal? Yes No

Student Information

Taxable Income (to be reported on tax return)

Student's wages \$ _____
Spouse's wages \$ _____
Interest/dividend income \$ _____
Severance compensation \$ _____
Business Income (or loss) \$ _____
Capital gains (or loss) \$ _____
IRA/pension distribution \$ _____
Income from line 17 of 1040 \$ _____
Farm income (or loss) \$ _____
Unemployment compensation \$ _____
W-2 form, box 12 \$ _____
codes D-H and S _____
Social security benefits (taxable) \$ _____
Any other taxable income \$ _____
Source _____ \$ _____

2011 Untaxed Income

Housing allowance for clergy (or value of parsonage) \$ _____
Workers compensation \$ _____
Child support \$ _____
Any other untaxed income \$ _____
Source _____ \$ _____

Unemployment Dates

From _____ To _____

Is this unemployment seasonal? Yes No

Please Attach

- A signed copy of Verification Form
- A signed copy of the parent's 2010 federal tax return and W-2 forms
- A signed copy of the student's 2010 federal tax return
- Document from state unemployment office, if appropriate.

Signature of Student and Parent/Spouse

Student Signature _____ Date _____

Parent/Spouse Signature _____ Date _____