

## Bucknell University Financial Aid Request for Review Due to Special Circumstances

We recognize that the Free Application for Student Aid (FAFSA) may not always portray a clear picture of your family's financial situation. If this is the case for your family or if your parents' financial circumstances have changed since you have submitted the FAFSA, you may request a reevaluation of your financial aid eligibility.

Special circumstance reviews will be completed within 2 – 3 weeks after receipt of all required documents. However, after the initial review of your submitted documents, you may be notified that additional information is needed, in which case the review will take longer to complete. After the review has been processed, you will be notified by email of any financial aid changes that resulted from your special circumstances. **Please note that a recalculation in financial need does not guarantee that additional aid will be awarded.** In most cases, the only additional aid we can suggest will be loans. In addition, please note that we do expect you to borrow the maximum Federal Direct Loans (both subsidized and unsubsidized) for which you are eligible before you may be considered for additional aid from any University source.

Changes in financial circumstances include the following:

- Loss of employment – must be out of work for at least 8 weeks before review may be considered.
- Change in employment
- Retirement
- Other loss of income – (child support, spousal support, etc.)
- Divorce/Separation
- Death of a parent
- High unreimbursed medical and/or dental expenses
- One-time payment received

### Documentation Required

Change in Financial Circumstances	Required Documentation
<p>Significant loss of income due to termination, retirement, and/or change in employment</p> <p>Please note:</p> <ul style="list-style-type: none"> <li>• The earliest we will consider a request for review due to unemployment will be 8 weeks from the date of termination/unemployment.</li> <li>• Changes may not be considered if income loss for 2022 and/or 2023 is not significant.</li> </ul>	<ul style="list-style-type: none"> <li>• A detailed, written letter explaining the family's change in circumstances</li> <li>• Complete copy of parents' 2022 federal tax return</li> <li>• Copy of parents' 2022 W-2 form</li> <li>• Copy of parents' most recent pay stub(s) for 2023; or if self-employed, projection of 2023 income</li> <li>• Copy of employment termination letter</li> <li>• Copy of unemployment benefit eligibility from Dept. of Labor</li> <li>• Copy of severance letter (if received)</li> <li>• Documentation of any other income parents will receive during 2023 (e.g. social security benefits, distributions from retirement accounts, cash support, etc.)</li> </ul>
<p>Other loss of income (child support, spousal support, etc.)</p>	<ul style="list-style-type: none"> <li>• A detailed, written letter explaining the family's change in circumstances</li> <li>• Documentation that child support/spousal support has ended</li> <li>• Complete copy of parents' 2022 federal tax return</li> <li>• Copy of parents' 2022 W-2 form</li> <li>• Copy of parents' most recent pay stub for 2023</li> <li>• Documentation of any other income parents will receive during 2023 (e.g. social security benefits, distributions from retirement accounts, etc.)</li> </ul>

<p>Change in marital status</p>	<ul style="list-style-type: none"> <li>• A detailed, written letter explaining the family's change in circumstances</li> <li>• Copy of legal separation/divorce agreement (court-ordered or letter from attorney)</li> <li>• Proof of separate addresses (i.e. utility bills)</li> <li>• Signed copy of lease agreement for parent no longer living at primary address</li> <li>• Complete copy of custodial parent's 2022 federal tax return</li> <li>• Copy of custodial parent's 2022 W-2 form</li> <li>• Copy of custodial parent's most recent pay stub for 2023</li> <li>• Documentation of any other income custodial parent will receive during 2023</li> </ul>
<p>Death of parent or spouse</p> <p>- Copy of death certificate required</p>	<p>The following may be required, depending on the family situation:</p> <ul style="list-style-type: none"> <li>• A detailed, written letter explaining the family's change in circumstances</li> <li>• Complete copy of parents' 2022 federal tax return</li> <li>• Copy of parents' 2022 W-2 forms</li> <li>• Copy of parents' most recent pay stub for 2023</li> <li>• Documentation of expected Social Security benefits for all members</li> <li>• Documentation of other distributions from inheritance, assets, or other benefit sources including life insurance</li> <li>• Documentation of any other income parent will receive during 2023</li> </ul>
<p>Significant and/or recurring medical or dental expenses not covered by insurance for family members in your household</p>	<ul style="list-style-type: none"> <li>• A detailed, written letter explaining the family's change in circumstances</li> <li>• Copy of billing statements from the medical and dental provider(s) and proof of payment for expenses paid out-of-pocket during 2021</li> <li>• Documentation of continuing 2022 and 2023 expenses not covered by insurance</li> <li>• Complete copy of parents' 2022 federal tax return</li> <li>• Copy of parents' 2022 W-2 form</li> <li>• Copy of parents' most recent pay stub for 2023</li> <li>• Documentation of any other income parents will receive during 2023</li> </ul>
<p>One-time income received in 2021 that will not be received during 2022 and/or 2023 (examples include: severance, capital gains, IRA distributions, etc.)</p>	<ul style="list-style-type: none"> <li>• A detailed, written letter explaining the family's change in circumstances</li> <li>• Complete copy of parents' 2022 federal tax return</li> <li>• Copy of parent's 2022 W-2 form</li> <li>• Copy of parents' most recent pay stub for 2023</li> <li>• Documentation of any other income parents will receive during 2023</li> </ul>

Requests for review and supporting documentation should be submitted to:

**Bucknell University's Office of Financial Aid**

**Fax: 570-577-1481      Mail: 621 St. George Street, Lewisburg, PA 17837**