FINANCIAL AID OFFICE

2013-2014 REQUEST FOR REVIEW OF **CALENDAR YEAR** INCOME DATA

Independent Student

Special Circumstances

IMPORTANT

Federal regulations require all applicants to report calendar year 2012 income figures on their 2013-2014 Free Application for Federal Student Aid (FAFSA). Federal regulations also allow the Financial Aid Office to revise the information on your financial aid application for award year 2013-2014, if documented special circumstances exist. Examples of special circumstances include: loss of student's or spouse's (if married) income due to lay-off or termination of employment, separation, divorce, or other mitigating circumstances beyond your or your spouse's control.

By following the instructions below you may request a review of income data. If your request is granted, the Financial Aid Office will change the income information originally reported on your FAFSA to reflect your and your spouse's (if married) income for the calendar year 2013. All requests will be reviewed by a Financial Aid Advisor. Not all requests are granted. Requests are approved or denied based on the information provided.

Required Documentation

In order for a Financial Aid Advisor to review your request, you must provide documentation of your special circumstances and submit **ALL** of the following forms. **Do not leave any question blank.**

- ☑ Student/Spouse (if married) 2012 IRS Transcript of Tax Return
  (only required if IRS Data Retrieval was not used, see attached instructions)
- ☑ Student's 2012 W-2's
- ☑ Spouse's (if married) 2012 W-2's
- ☑ Student/Spouse (if married) 2013 IRS Transcript of Tax Return
  (if appeal is submitted after April 15, 2014)
- ☑ Student's 2013 W-2's
- ☑ Spouse's (if married) 2013 W-2's

  } (if appeal is submitted after January 31, 2014)
- ☑ 2013-2014 Personal Statement of Explanation
- ☑ 2013-2014 Statement of Information
- ☑ 2013 Projected Award Year Income Statement
- ☑ Student's Statement of Projected Basic Living Expenses

  } (included in this packet)

You must also provide supporting documentation of your special circumstances. Examples of acceptable documentation are listed below. Requests submitted without supporting documentation may be delayed or denied until the documentation is received.

- ☞ Copies of current or final pay stubs, benefit checks or employer statements for each job
- ☞ Copy of termination notice or letter from employer confirming termination date
- ☞ Unemployment Award Letter and the most recent Unemployment check stub
- ☞ Proof of separation or divorce, if applicable
- ☞ Any other documentation that supports your request for review

SUBMIT ALL FORMS AND DOCUMENTS TO THE FINANCIAL AID OFFICE

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013-2014 PERSONAL STATEMENT OF EXPLANATION

Independent Student

Please explain, in detail, your special circumstances and why you are requesting a Financial Aid Advisor to change your and/or your spouse's (if married) 2013-2014 FAFSA income information. Incomplete explanations may cause delay or denial of your request. (If you need additional space, continue on the back of this form).

Print or Type: _____

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CERTIFICATION: I certify that all information on this form is true, complete, and accurate. Upon request, I agree to provide proof of the information reported on this form. False statements or misrepresentation can be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted. ***I understand that I must report changes of the above information to the Financial Aid Office.***

Student's Signature _____ Date _____

FAO: ☐ Appeal **APPROVED** ☐ Appeal **DENIED** Date _____ FAO Initial _____

Prior EFC: _____ Trans #: _____ New EFC: _____ Trans #: _____

Reason: _____

_____

_____

_____

_____

_____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013-2014 STATEMENT OF INFORMATION

Independent Student

Complete all questions in applicable sections only. If your or your spouse's (if married) income information did not change leave that section blank.

STUDENT'S SECTION

1. Did you voluntarily quit or reduce your hours at work? ☐ YES ☐ NO

If YES, please explain why: _____

When did you quit or reduce your hours? (month/year) _____

If you are still working, how many hours per week? _____

2. Were you laid-off or terminated from your job? ☐ YES ☐ NO

If YES, when were you were laid-off or terminated? (month/year) _____

3. Do you receive child support? ☐ YES ☐ NO

4. Have Unemployment Benefits been applied for? ☐ YES ☐ NO

If YES, when will (did) the Unemployment Benefits start? (month/year) _____

SPOUSE'S SECTION (if married)

1. Did your spouse voluntarily quit or reduce their hours at work? ☐ YES ☐ NO

If YES, please explain why: _____

When did she/he quit or reduce their hours? (month/year) _____

If she/he is still working, how many hours per week? _____

2. Was she/he laid-off or terminated from their job? ☐ YES ☐ NO

If YES, when was she/he laid-off or terminated? (month/year) _____

3. Does your spouse receive child support? ☐ YES ☐ NO

4. Have Unemployment Benefits been applied for? ☐ YES ☐ NO

If YES, when will (did) the Unemployment Benefits start? (month/year) _____

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Student's Signature _____ Date _____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013 PROJECTED CALENDAR YEAR INCOME STATEMENT

Independent Student

Do not leave any section blank. If any part of this form is left blank it will not be accepted. If you and your spouse (if married) list "0" income for any month, provide an explanation on the back of this form or a separate sheet of how your expenses listed on the Statement of Projected Basic Living Expenses form will be paid. Failure to include this explanation may cause delay or denial of your request. LIST GROSS INCOME FIGURES. **Gross income** is earnings before taxes and other deductions are subtracted.

* **Taxable income** is any income that is reported to the IRS. Unemployment Benefits are taxable income.

** **Untaxed income** includes earnings from work paid by cash or check ***not*** being reported to the IRS, child support, TANF/CalWorks, General Relief, Social Security (or any other cash retirement benefits), and cash received from friends or relatives used to pay living expenses.

Student's 2013 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
Jan. 2013			
Feb. 2013			
March 2013			
April 2013			
May 2013			
June 2013			
July 2013			
Aug. 2013			
Sept. 2013			
Oct. 2013			
Nov. 2013			
Dec. 2013			
Income Totals			

Spouse's (if married) 2013 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
Jan. 2013			
Feb. 2013			
March 2013			
April 2013			
May 2013			
June 2013			
July 2013			
Aug. 2013			
Sept. 2013			
Oct. 2013			
Nov. 2013			
Dec. 2013			
Income Totals			

CERTIFICATION: I certify that all information reported on this form is true, complete, and accurate to the best of my knowledge. I agree to provide proof of the information that I have reported on this form. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted. ***I understand that I must report changes of the above figures to the Financial Aid Office.***

Student's Signature _____ Date _____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

STUDENT'S STATEMENT OF PROJECTED BASIC LIVING EXPENSES
January 2013 - December 2013

INSTRUCTIONS: Complete the information below by listing expenses that you and your spouse (if married) will pay between January and December 2013. If amounts differed from month to month, provide an average for the 12-month period. Do not include any expenses covered by food stamps or housing assistance. If an expense is not applicable (i.e., car payments), put a "0". **Do not leave any question blank.**

	Amount per **MONTH** (Do not leave any amount blank)
1. Rent or Mortgage (include principal, interest and taxes)	$ _____
2. Utilities (gas, electric, water, telephone, cell phone etc.)	$ _____
3. Food (at home and away from home)	$ _____
4. Car Payment(s)	$ _____
5. Transportation (gas, oil, repairs and/or maintenance, bus passes)	$ _____
6. Elementary/Secondary Tuition or Child Care Paid	$ _____
7. Car Insurance expenses	$ _____
8. Medical/dental expenses paid but NOT covered by insurance	$ _____
9. Child Support Paid (due to divorce or separation)	$ _____
10. Expenses for clothing, entertainment, gifts & travel	$ _____
11. Other Expenses: _____	$ _____

Do you or your spouse (if married) receive Food Stamps/SNAP? ☐ YES ☐ NO

Do you or your spouse (if married) receive housing subsidies? ☐ YES ☐ NO

CERTIFICATION: I certify that all information reported on this form is true, complete, and accurate to the best of my knowledge. I agree to provide proof of the information that I have reported on this form. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted.

Student's Signature _____ Date _____

FOR FINANCIAL AID OFFICE USE ONLY

Total Monthly Expenses _____ Total Annual Expenses (12 mo.) _____

Total Student's Income _____ Total Spouse's Income _____ Total All Income _____

FINANCIAL AID OFFICE

IRS Request for Transcript of Tax Return

If you and your spouse (if married) filed federal tax returns with the IRS, you may be eligible to use the IRS Data Retrieval Tool*, which is the best and easiest way to provide accurate tax information. With just a few simple steps you can view information from your 2012 IRS tax return and transfer that information directly into your 2013-2014 FAFSA (fafsa.gov). If you transfer the data from the IRS to your FAFSA (and the information remains unchanged), you will not be required to provide transcripts of tax returns for 2012. For married students, this option is available only if you and your spouse filed a joint tax return.

**The IRS Data Retrieval Tool option is currently not available for students who completed the CA Dream Application. You must provide a copy of the 2012 Transcript of Tax Return from the IRS.*

An IRS Transcript of Tax Return for 2013 federal tax returns is required if this appeal is submitted after April 15, 2014.

A separate Transcript of Tax Return is needed for each tax return filed

A Transcript of Tax Return from the IRS shows most line items from your federal tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes you, your representative or the IRS made after the return was filed. **If you are married but filed separate federal tax returns in 2011, we need a separate tax transcript for you and your spouse.** If you are not eligible or choose not to use the IRS Data Retrieval Tool you have several options for providing this information.

- Order a Transcript of Tax Return online at IRS.gov. Click on "Order a Return or Account Transcript" and then click on "Order a Transcript". Provide the required information to request a "Return Transcript" for "2012". Online requests cannot be processed if you need the transcript mailed to an address other than the one the IRS has on file for you.

OR

- Fill out the Short Form Request for Individual Tax Return Transcripts (Form 4506T-EZ). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf and complete the form. For question #6 enter "2012". Be sure the taxpayer signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**If you filed an individual return and lived in**" on page 2 of the 4506T-EZ or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- If you need information from other IRS forms, such as Form W-2 or Form 1099, you can use the Request for Transcript of Tax Return (Form 4506-T). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506t.pdf and complete the form. For question #9 you should enter "2012". Be sure the taxpayer signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1010)**" on page 2 of the 4506-T or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- Call the IRS at **(800) 908-9946** and order a Transcript of Tax Return for 2012.