



## STONEHILL COLLEGE

Student Financial Services

## 2014-2015 Special Conditions Form Dependent Student

Student's Name \_\_\_\_\_ Student's ID Number \_\_\_\_\_

Student's Signature \_\_\_\_\_ Parent's Signature \_\_\_\_\_

Date \_\_\_\_\_

Your signatures above certify that the information reported on this form is true and accurate to the best of your knowledge. This Office reserves the right to request supporting documentation, including Federal Income Tax returns for past or future years.

### Instructions

1. Identify the applicable special condition(s)
2. Compile the documents required for the condition(s) you identify
3. Complete Part(s) A, B, and/or C on the back of this form as appropriate
4. Return to Student Financial Services this form and the following required documents:
  - a. A signed letter explaining your special condition(s)
  - b. A 2014-2015 Stonehill Verification Form
  - c. SIGNED copies of parent's and student's 2013 Federal Income Tax returns, with Schedules
  - d. All parent and student 2013 W2 forms
  - e. Student and Parent IRS Data Retrieval or copies of Tax Return Transcripts
    - o Instructions available at <http://www.stonehill.edu/costs-financial-aid/forms-documents/>

**Note: This information will not be reviewed until all documents listed in Step 4 are received.**

**Identify the SPECIAL CONDITION... and submit the appropriate DOCUMENTATION**

#### LOSS OF INCOME

- 1) A parent has been unemployed or unable to work for at least 30 days in 2014, and the lost income is equal to at least 8% of the total family income earned in 2013; **OR**
- 2) There has been a decrease in parental income since 2013; **OR**
- 3) You received Social Security Benefits but no longer receive these benefits

Complete **Part A** on the back of this form.

#### Submit this **Documentation for (1)**

A letter from your parent's employer or a copy of the termination which confirms:

- Last date of employment
- Average number of hours worked per week
- Number of weeks worked in 2013; and
- Total wages earned in 2013 (YTD paystub)

Certification of Unemployment Benefits and severance pay

#### Submit this **Documentation for (2)**

Copies of last pay stub at original rate and first pay stub at current rate.

#### Submit this **Documentation for (3)**

Copy of Notice of Termination of Benefits

#### CHANGE IN HOUSEHOLD SIZE

- 1) Your parents have recently separated or divorced; **OR**
- 2) A parent has recently passed away

Complete **Part B** on the back of this form

#### Submit this **Documentation for (1)**

A copy of court order, or the official document, which confirms date of separation/divorce

#### Submit this **Documentation for (2)**

A copy of death certificate, obituary, OR printed program from the memorial service

#### HIGH OUT-OF-POCKET MEDICAL EXPENSES

- 1) Your family had extraordinary out-of-pocket medical, dental, or elder care expenses in 2013. To qualify, these expenses must have been paid in 2013.

Complete **Part C** on the back of this form.

#### Submit this **Documentation for (1)**

Schedule A (itemized deductions) filed with the 2013 Federal Income Tax return; **OR**, if no Schedule A was filed, photocopies of receipts and an itemized listing of medical/dental/elder care payments made during 2013 showing total expenses not covered by insurance.

**PART A – LOSS OF INCOME – COMPLETE EVERY ITEM; ENTER –0- WHERE APPROPRIATE**

Who lost income or benefits?.....	<input type="checkbox"/> Parent 1 <input type="checkbox"/> Parent 2
Parent 1's projected wages, salaries, tips for 2014 .....	\$ _____ .00
Parent 1's projected unemployment compensation for 2014.....	\$ _____ .00
Parent 1's severance pay.....	\$ _____ .00
Parent 2's projected wages, salaries, tips for 2014.....	\$ _____ .00
Parent 2's projected unemployment compensation for 2014.....	\$ _____ .00
Parent 2's severance pay.....	\$ _____ .00
Parents' total projected other taxable income for 2014.....	\$ _____ .00
Parents' total projected untaxed income*, including alimony and child support.....	\$ _____ .00
Parents' total pensions and annuities .....	\$ _____ .00
Parents' total interest and dividend income .....	\$ _____ .00
Parents' total business or farm income .....	\$ _____ .00
Parents' total income received from rents, after expenses .....	\$ _____ .00

**PART B – CHANGE IN PARENT MARITAL STAUTS – Only report info for parent you live with**

Parents' current marital status  Single    Separated    Divorced    Widowed   Date of change \_\_\_/\_\_\_/\_\_\_

Name of Parent you live with \_\_\_\_\_      Report information for this parent below:

Number of family members in 2014..... \_\_\_\_\_

Number of family members in college during 2014-2015..... \_\_\_\_\_

Age of parent whose income you are reporting .....

This parent's projected income earned from work in 2014 .....

Other projected taxable income for 2014.....

Projected untaxed income\*, including child support, for 2014 .....

Total cash, savings, and checking accounts .....

Other real estate/investments .....      value: \$ \_\_\_\_\_ .00      debt: \$ \_\_\_\_\_ .00

**Do not include the house in which you live**

Business / farm .....      value \$ \_\_\_\_\_ .00      debt: \$ \_\_\_\_\_ .00

**PART C – HIGH OUT-OF-POCKET MEDICAL EXPENSES**

How much did your parents pay for your family's medical/dental insurance in 2013? ..... \$ \_\_\_\_\_ .00

**Do not include employer's contribution**

What were your family's 2013 medical/dental/elder care costs not covered by insurance?.. \$ \_\_\_\_\_ .00

**This amount should be your out-of-pocket costs**

**\*The following is considered "untaxed income":**

- Deductible IRA and/or Keough payments
- Earned Income Credit
- Untaxed portions of pensions (excluding "rollovers")
- Payments to tax-deferred pensions/savings plans paid directly or withheld from earnings
- Welfare benefits, including AFDC/ADC
- Workers' Compensation
- Untaxed Social Security benefits
- Tax exempt interest income
- **Hope Scholarship tax credit**
- Lifetime Learning tax credit
- Veterans' non-education benefits, such as Death Pension and Dependency and Indemnity Compensation (DIC), etc.
- Housing, food, or other living allowances paid to members of the military, clergy, or others
- Cash gifts or any money paid on family's behalf
- Credit for federal tax on special fuels
- Foreign income exclusion