



Lander University Office of Financial Aid

320 Stanley Avenue, Greenwood, SC 29649
 Email Address: finaid@lander.edu • Web Site: www.lander.edu/finaid
 Phone: (864) 388-8340 • Fax: (864) 388-8811

2009-2010 Student Contribution Adjustment Request

Complete this form if you feel your family has special circumstances that should be considered with your application for financial aid. Attach a letter of explanation and appropriate documentation (see back of form) for the circumstance you wish to have considered. All sections below must be completed and the form must be signed in order for the request to be reviewed. **If you have a special circumstance that you feel warrants a review but is not listed below, please speak with a counselor in the Office of Financial Aid for additional instructions.**

Student's Last Name, First, M.I.

Lander ID Number

Local Address

Local Phone Number

Circumstances and documentation:

Your request for an adjustment must be accompanied by the following:

- You must have submitted your 2009-2010 Free Application for Federal Student Aid (FAFSA) at www.fafsa.ed.gov.
- A letter of explanation explaining clearly the circumstance(s) surrounding the request; **AND**
- 2009-2010 Verification Form, if not already submitted (copy available at end of form or at <http://www.lander.edu/finaid/forms/>; **AND**
- Student's Signed 2008 Federal Tax Returns and W-2s (if not already submitted); **AND**
- Appropriate documentation from the chart below:

Circle one	Circumstance	Documentation Needed
1	Student has become separated or divorced since applying for aid.	<ul style="list-style-type: none"> ▪ Copy of divorce or legal separation agreement or notarized letter confirming separation
2	Spouse, whose income was included on the application, has died.	<ul style="list-style-type: none"> ▪ Copy of death certificate
3	<p>Student or spouse has experienced a loss of employment resulting in a significant decrease in income for the 2009 tax year compared to the 2008 tax year (January 1-December 31).</p> <p>Date Change Occurred: _____</p>	<ul style="list-style-type: none"> ▪ Letter from employer documenting last day of employment ▪ Copy of last pay stub ▪ Documentation of severance pay, vacation pay, unemployment, retirement or disability benefits to be received for 2009, if applicable ▪ Projected 2009 Income Statement
4	<p>Student or spouse has experienced a change in employment resulting in a significant decrease in income for the 2009 tax year compared to the 2008 tax year (Jan. 1-Dec. 31).</p> <p>Date Change Occurred: _____</p>	<ul style="list-style-type: none"> ▪ Letter from employer documenting change in employment ▪ Copy of last pay stub from prior job ▪ Copy of last 3 pay stubs from new job ▪ Projected 2009 Income Statement
5	Student or spouse received unemployment compensation or some type of untaxed income or benefit (i.e., Social Security, child support) in the last calendar year but has completely lost this income or benefit. The untaxed income or benefit must be from a public or private agency, a company, or because of a court order.	<ul style="list-style-type: none"> ▪ Letter from the benefit agency documenting that benefit has ceased.
6	Student or spouse received a one-time lump sum distribution.	<ul style="list-style-type: none"> ▪ Documentation of type, source, and date of lump-sum distribution.
7	The family has paid unusual medical, dental, or nursing home expenses, not covered by insurance.	<ul style="list-style-type: none"> ▪ Medical bills or account statements showing medical expenses paid (OR 2008 Schedule A showing medical expenses). Expenses covered by insurance will not be considered.
8	Student's taxable income increased due to a fund transfer from a regular IRA account to a Roth IRA account.	<ul style="list-style-type: none"> ▪ Documentation that funds were transferred from a regular IRA to a Roth IRA.
9	The family has paid elementary and/or secondary school tuition for dependents.	<ul style="list-style-type: none"> ▪ Letter or bill from school documenting amount of tuition paid for 2008.
10	Student paid dependent care expenses not covered by another source.	<ul style="list-style-type: none"> ▪ Letter or bills documenting amount and type of expenses paid for 2008.

Projected 2009 Income Statement

10SCAR

1. Identify the reason (from reverse of this sheet) that a review is requested: _____

2. Identify any taxable income the student expects to receive 01-01-09 through 12-31-09

- A. Wages, Salaries, Tips: Student \$ _____ Spouse \$ _____
(Refer to worksheet below.)
- B. Taxable portion: Pensions and/or Annuities: \$ _____
- C. Interest/Dividend Income: \$ _____
- D. Rental Income, Alimony, or Other Income \$ _____

3. Identify any untaxed Income the student and/or spouse expects to receive 01-01-09 through 12-31-09:

- A. VA Non-Educational Benefits \$ _____
- B. Unemployment or Welfare/AFDC Benefits \$ _____
- C. Child Support \$ _____
- D. Untaxed portion: Pensions and/or Annuities: \$ _____
- E. Military or Clergy Housing/Food Allowance \$ _____
- F. Any Other Untaxed Income: \$ _____

I declare that the information reported on this document is true and accurate, and I understand that the Office of Financial Aid reserves the right to deny a possible adjustment when sound documentation is not provided. I understand that Lander University may verify all estimates of income at year end. Adjustments may be made to current or future financial aid if inaccurate estimates of income result in a financial aid overaward.

Student Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Worksheet for Estimating 2009 Wages, Salaries, & Tips for the Student /Spouse Experiencing Loss or Change in Employment	
1. What is the year-to-date earnings on your final 2009 pay stub for former position? (Please attach copy of paystub.) Last date of employment:	
2. What is the amount you are receiving per month for your new position, if now employed? (Please include a copy of your last 2 pay stubs documenting your monthly salary.) Start date for new position, if applicable: _____	
3. Number of Months you will receive this income between 1/1/09 and 12/31/09.	
4. Total anticipated earnings from new position (Item #2 multiplied by Item #3)	
5. Total Anticipated Income for 2009 (include in Box a. on Projected Year Income Statement)	

DATA ENTRY		COUNSELOR REVIEW	
RRAAREQ	N=Pending Review	Review SCAR instructions for all required docs. If not collected, note why.	
Initials/date		FAO Counselor/Committee Decision (circle)	Approved Denied
Fwd to Counselor date		Verification Completed and RNAVRxx updated (Note on Verf Review Wksht adjustments and attach PCAR)	
		RNANAx/Information Release tab – PJ Used = YES	
		Recalc Need, update ROAUSDF etc and trans #, update RPAAWRD for aid	
		RRAAREQ – 10 SCAR + add CORRP for correction	
		RHACOMM	
		Add to Excel for PJs and mail merge appropriate ltr based on whether ISIR rec'd or paper FAFSA coded	
		CNSLR Initials and date	



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2009-2010 Verification Worksheet

Student's Last Name	First	Middle	Lander ID #
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Your application for federal student aid was selected for a review process called "verification." In this process, federal law requires the school to collect financial documents to ensure the accuracy of the information reported on the student's **Free Application for Federal Student Aid (FAFSA)**. After all documents are received, the information will be reviewed for accuracy and adjustments and any conflicts or inconsistent information will be corrected and aid packages adjusted as necessary.

You must return this completed form as well as all required financial documents (signed federal income tax forms, schedules, W-2s, etc.) to the Financial Aid Office **within 15 days after receiving this notification** in order for financial assistance to be disbursed. **Awards made prior to completion of verification are estimates only and are subject to change.**

Important Instructions for Completion of Verification – PLEASE READ AND FOLLOW

1. Print the student's name and Lander ID or Social Security number on the top of all supporting documents.
2. **Do not leave any item blank. If the answer is "0", put "0."** *Incomplete Worksheets will be returned for completion.*
3. Submit a complete and signed copy of your 2008 federal tax returns and your parent's or spouse's signed 2008 returns. **A complete copy includes every page of the return: all schedules, attachments, and W-2s.**
4. You may mail or fax this information to us.
5. For additional explanations for FAFSA verification questions, refer to http://studentaid.ed.gov/students/publications/completing_fafsa/2009_2010/ques.html and review your FAFSA at www.fafsa.ed.gov.

Section A: Student Status

FAFSA QUESTION#	DEPENDENCY QUESTIONS (Please check the box for YES or NO)	YES	NO
48	Were you born before January 1, 1986?		
49	As of today, are you married? (Also answer "Yes" if you are separated but not divorced.)		
50	At the beginning of the 2009–2010 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)?		
51	Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?		
52	Are you a veteran of the U.S. Armed Forces?		
53	Do you have children who will receive more than half of their support from you between July 1, 2009 and June 30, 2010?		
54	Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2010?		
55	At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?		
56	Are you or were you an emancipated minor as determined by a court in your state of legal residence?		
57	Are you or were you in legal guardianship as determined by a court in your state of legal residence?		
58	At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?		
59	At any time on or after July 1, 2008, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?		
60	At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?		

If you, the student, answered "**NO**" to all of the above questions, you are considered a **dependent student** for federal financial aid purposes and must provide your parents' information and tax forms as well as your own. (**Note: Grandparents, foster parents, and legal guardians are not considered parents for this form and their information cannot be used.**)

If you answered "**YES**" to any of the above questions, you are considered an **independent student** and only need to provide your information and tax returns (as well as your spouse's, if married).

Section B: Household Information**** Important – This section MUST be complete. ******Instructions for whom to include in “Name of Household Members”:****Dependent Students: If you are required to provide your parent’s information according to the instructions in Section A, you must include the following:**

- Yourself and your parent(s) (include stepparent) **NOTE: To determine who is considered a parent for purposes of this form, refer to http://studentaid.ed.gov/students/publications/completing_fafsa/2009_2010/ques3-5.html.**
- Your parent’s other children if (a) your parents will provide more than half of their support from 7-1-2009 through 6-30-2010 or (b) the children could answer “NO” to every question in Section A,
- Other people if they now live with your parents and your parents provide more than half of their support, and will continue to provide more than half of their support from 7-1-2009 through 6-30-2010.

Independent Students: If you are not required to provide your parent’s information according to the instructions in Section A, you must include the following:

- Yourself and your spouse if you have one,
- Your children, if you will provide more than half of their support from 7-1-2009 through 6-30-2010,
- Other people if they now live with you and you provide more than half of their support, and will continue to provide more than half of their support from 7-1-2009 through 6-30-2010.

Name of Household Members	Social Security Number	Relationship to Student	Age	If this individual received assistance from any of the following federal benefit programs at any time during 2008, please list the program in the space below. SSI, Food Stamp Program, Free or Reduced School Lunch, TANF, WIC	Name of College if this family member will be enrolled for 2009-2010 at least half-time in a program that leads to a college degree or certificate. Do not list a college for your parent(s).
1.		SELF			LANDER UNIVERSITY
2.					
3.					
4.					
5.					

(If you need additional space, attach an additional page.)

Section C: Tax Information

All tax filers must submit a SIGNED and LEGIBLE copy of their 2008 federal income tax returns (1040, 1040A, or 1040EZ) including all schedules and W-2 forms. *Unsigned forms will be returned and your application will be put on hold.* **Please Note: US Electronic Filing Form 8453 is NOT acceptable. If you need a copy of your 2008 tax forms, you may call 1-800-829-1040 to request a tax summary. If an accountant or tax preparer prepared the tax returns, you may get a copy from them. You must sign this tax summary before sending it to the Office of Financial Aid.**

PARENT’S TAX FILING STATUS (check only one box below)
 Check here if you filed and attach a copy of **signed 2008 federal tax returns, schedules, 1099s and W-2 forms.**
 Check here if you will not file and are not required to file a tax return for 2008. Enter income earned from work here: father _____ mother _____

REGARDLESS of status, submit W-2 forms for 2008. If no W-2s were issued, note reason: _____
STUDENT’S TAX FILING STATUS (check only one box below)
 Check here if you filed and attach a copy of **signed 2008 federal tax returns, schedules, 1099s and W-2 forms** for student (and spouse, if married).

 Check here if you will not file and are not required to file a tax return for 2008. Enter 2008 income earned from work here: student _____ spouse if married _____

REGARDLESS of status, submit W-2 forms for 2008. If no W-2s were issued, note reason: _____

Section D: Untaxed Income and Exclusion Information

Please list all sources of earned taxed income and untaxed benefits that you (the student) and/or your parents received for 2008. List totals for the year, **not monthly amounts**. **IMPORTANT - Enter "0" when appropriate. DO NOT LEAVE ANY ITEM BLANK. If not applicable, enter "0". A value must be placed in every blank. Do NOT draw lines – a value MUST be placed in each blank.**

FAFSA #	Student/ Spouse	Additional Financial Information	Parent(s)	FAFSA #
46a		Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 31.		94a
46b		Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 96.		94b
46c		Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.		94c
46d		Grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships		94d
46e		Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).		94e

FAFSA #	Student/ Spouse	2008 Untaxed Income	Parent(s)	FAFSA #
47a		Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.		95a
47b		IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17		95b
47c		Child support received for all children. Don't include foster care or adoption payments.		95c
47d		Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.		95d
47e		Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.		95e
47f		Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.		95f
47g		Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).		95g
47h		Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.		95h
47i		Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.		95i
47j		Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.		

Section E: Signatures

By signing this worksheet, I/We certify that all of the information reported is complete and accurate.

Student (Required) Date

Spouse (Of independent student - optional) Date

Parent (Required for dependent student) Date

DATA ENTRY		COUNSELOR REVIEW	
RRAAREQ	N=Pending Review	Complete Verf Review form	
Initials/date		CNSLR Initials/date	
Fwd to Counselor date			