

You have indicated you wish to appeal for additional financial aid for the 2009-10 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 severe cases, there may be an increase in gift assistance.

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 Stafford loan, SELF 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 2008 or 2009 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 2008 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.
- If you are appealing based on significantly reduced 2009 parental income, please project parents' income from all sources in 2009 on the back of this form and explain reason in box below.
- If you are appealing based on your significantly reduced 2009 income, please project your income from all sources in 2009 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 2009 income from all sources.

**Parent Information**

**2009 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 \$ \_\_\_\_\_  
 2009 W-2 form, box 12 \$ \_\_\_\_\_  
 codes D-H and S \_\_\_\_\_  
 Social security benefits (taxable) \$ \_\_\_\_\_  
 Any other taxable income \$ \_\_\_\_\_  
 Source \_\_\_\_\_ \$ \_\_\_\_\_

**2009 Untaxed Income**

Housing allowance for military or 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**

**2009 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 \$ \_\_\_\_\_  
 2009 W-2 form, box 12 \$ \_\_\_\_\_  
 codes D-H and S \_\_\_\_\_  
 Social security benefits (taxable) \$ \_\_\_\_\_  
 Any other taxable income \$ \_\_\_\_\_  
 Source \_\_\_\_\_ \$ \_\_\_\_\_

**2009 Untaxed Income**

Housing allowance for military or 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 2008 federal tax return and W-2 forms
- A signed copy of the student's 2008 federal tax return

**Signature of Student and Parent/Spouse**

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent/Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_