



*Independent*

## 2011-2012 Request for Re-evaluation

This form can be used to request a review of federal financial aid when there is a current significant reduction in your/your spouse's income or when there are present extenuating financial circumstances. Please do not submit this form unless you are an admitted student to Hofstra and have a complete and valid 2011-2012 Free Application for Federal Student Aid (FAFSA) that is on file with Hofstra.

To help us determine if any adjustment can be made to your federal financial aid awards, please submit the following:

- 1) **Signed and completed 2011-2012 Request for Re-evaluation Form** (the entire form must be complete or it may delay the processing time)
- 2) **Verification Documents:** (if filing after January 1<sup>st</sup>, 2012, 2011 tax returns are required)
  - A. SIGNED copies of your/your spouse's 2010 U.S. Federal Income Tax forms & all schedules
  - B. Copy of your/your spouse's 2010 W2 forms
  - C. Independent 2011-2012 Verification Worksheet (attached)
- 3) **Please indicate the circumstance(s) for which you are requesting a Re-evaluation:**

\_\_\_ Involuntary Loss of Employment

\_\_\_ Loss of Other Income/Benefits

\_\_\_ Separation/Divorce

\_\_\_ Death of Your Spouse

\_\_\_ Excessive Medical Expenses Paid

Please read Section I for additional documentation that you must provide in order to complete the process.

### **Return all applicable documentation to:**

Office of Student Financial Services (Financial Aid), 126 Hofstra University, 206 Memorial Hall, Hempstead, NY, 11549-1260. If you are uncertain as to whether your situation can be considered for Re-evaluation or have questions about the process, please contact us at (516) 463-8000.

Student Name: \_\_\_\_\_ Hofstra ID#: 7 \_\_\_\_\_

### **SECTION I – Special Circumstance Information and checklist**

**A. Loss of Employment**

You/your spouse earned money in 2010 has lost employment for at least 10 weeks in 2011, because of termination, layoff, disability, retirement, company closing or plant shutdown.

Name of unemployed parent: \_\_\_\_\_

Date unemployment began: \_\_\_\_/\_\_\_\_/\_\_\_\_

If applicable, date returned to work: \_\_\_\_/\_\_\_\_/\_\_\_\_

Copy of termination notice *or* a statement from employer indicating last date of employment and the reason for the loss of employment (i.e. termination, layoff, disability, retirement, company closing or plant shutdown)

Most recent pay stubs (including your last pay stub)

Unemployment benefits document (must be submitted within 90 days of issuance)

**B. Loss of Other Income/Benefits**

You/your spouse received income in 2010 has completely lost that income for at least 10 weeks in 2011. The income must be from a public or private agency, or a company or a person ordered by the court to provide that income such as taxable Social Security benefits, untaxed court-ordered child support, untaxed retirement or disability benefits, or Temporary Assistance for Needy Families (TANF).

Name of person who lost the benefit:

\_\_\_\_\_  
Type of benefit lost: \_\_\_\_\_

Date benefit last received: \_\_\_\_/\_\_\_\_/\_\_\_\_

Proof of loss of income from appropriate agency

Most recent pay stubs (including last pay stub)

**C. Separation/Divorce**

You have separated or divorced AFTER the Free Application for Federal Student Aid (FAFSA) was filed. Separation or divorce must be prior to January 1, 2012.

Date of separation/divorce: \_\_\_\_/\_\_\_\_/\_\_\_\_

copy of the divorce decree, separation document or letter from Attorney

**D. Death**

Your spouse died after the Free Application for Federal Student Aid (FAFSA) was filed.

Name of deceased: \_\_\_\_\_

Date of death: \_\_\_\_/\_\_\_\_/\_\_\_\_

Copy of death certificate

**E. Excessive medical expenses paid**

You/your spouse/your dependent children have incurred unusually high uninsured or unreimbursed medical, optical, and/or dental expenses (including insurance premiums) that are in excess of 11% of the total 2010 Adjusted Gross Income (AGI) and have not already reduced the AGI by filing itemized deductions . Submit a detailed cover letter *and* a) a copy of the federal tax return Schedule A *or* b) copies of the receipts showing the amounts paid (please note that if you are filing due to medical expenses incurred with insurance, the receipts/documents need to clearly illustrate the amount paid by insurance and the amount paid out- of- pocket)

**SECTION II -- 2011 Estimated Income**

List the names of all the places where you have worked during 2011 along with total earnings to date before taxes. Please report your total taxable and untaxed income beginning January 1, 2011, through today's date in Column B. Please list your estimated total taxable and untaxed income from tomorrow's date through December 31, 2011, in Column C.

**Do not leave questions blank;** enter the appropriate numbers or "0" when no income is received.

	A	B	C	D
	Name of Employer/Company or Source of Income	Actual Income from 01/01/2011 to Today's Date ___/___/___	Estimated Income from Tomorrow through 12/31/2011	Total 2011 Income (column B+C)
Student's wages:		\$	\$	\$
Student's unemployment compensation:		\$	\$	\$
Spouse's wages:		\$	\$	\$
Spouse's unemployment compensation:		\$	\$	\$
Severance Pay:		\$	\$	\$
Other taxable income may include interest or dividend income, alimony, pensions, annuities,		\$	\$	\$
Business or farm income, taxable social security (include benefits received by you for all your dependent children):		\$	\$	\$
Temporary Assistance for Needy Families (TANF):		\$	\$	\$
Child support <i>received</i> for all children:		\$	\$	\$
Other untaxed income and benefits (i.e. disability; workmen's compensation; payment to tax deferred pension and savings plans such as 401(K) or 403(B) plans; housing, food or other living allowances; maintenance income from a separated spouse; cash support provided to you and/or bills paid by others on your behalf):		\$	\$	\$

**\*Section II must be complete in order to proceed with the Re-evaluation process**





# 2011-2012 Verification Worksheet

## Federal Student Aid Programs

FORM APPROVED  
OMB NO. 1845-0041

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 2010 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

### What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

### A. Student Information

\_\_\_\_\_  
Last name                                      First name                                      M.I.

\_\_\_\_\_  
Hofstra ID Number

\_\_\_\_\_  
Address (include apt. no.)

\_\_\_\_\_  
Date of birth

\_\_\_\_\_  
City    State    ZIP Code

\_\_\_\_\_  
Phone number (include area code) / cell phone number

### B. Family Information

List the people in your household, including:

- yourself, and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2011 through June 30, 2012, even if they do not live with you, and;
- 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 July 1, 2011 through June 30, 2012.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2011 and June 30, 2012, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Martha Jones (example)	24	Wife	City University
		Self	

**C. Student's Tax Forms and Income Information (all applicants)****Independent**

1. Check only one box below. Tax returns include the 2010 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your tax return.
- Check here if a signed tax return will be submitted to the school by \_\_\_\_\_ (date).
- Check here if you will not file and are not required to file a 2010 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 44 of the Free Application for Federal Student Aid (FAFSA).)

Sources of Untaxed Income	2010 Amount	Sources of Untaxed Income	2010 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2010 Federal income tax return, list below your employer(s) and any income received in 2010 (use the W-2 form or other earnings statements if available).

Sources	2010 Income
	\$
	\$
	\$

**D. Spouse's Tax Forms and Income Information (if student is married)**

1. Check only one box below. Tax returns include the 2010 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.

- Check here if you are attaching a signed copy of your and your spouse's joint tax return.
- Check here and attach spouse's signed tax return if your spouse filed a separate return.
- Check here if a signed spouse's tax return will be submitted to the school by \_\_\_\_\_ (date).
- Check here if your spouse will not file and is not required to file a 2010 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 44 of the FAFSA.)

Sources of Untaxed Income	2010 Amount	Sources of Untaxed Income	2010 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If your spouse did not file and is not required to file a 2010 Federal income tax return, list below your spouse's employer(s) and any income received in 2010 (use the W-2 form or other earnings statements if available).

Sources	2010 Income
	\$
	\$
	\$

**E. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. If married, spouse's signature is optional.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

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

\_\_\_\_\_  
Spouse Date

Do not mail this worksheet to the Department of Education. Submit this worksheet to your Financial Aid Administrator at your school. Don't forget to sign your tax forms.

**Use the Tables Below to Report Annual Amounts**

Report the total amounts received in 2010 **not** monthly amounts.

If the amount is zero, write "0", **do not leave blank.**

**STUDENT'S 2010 Additional Financial Information**

- a. Education Credits (Hope and Lifetime Learning tax credits (from IRS Form 1040 – line 49 or 1040A – line 31).  
\$ \_\_\_\_\_
- b. Child support paid by you or your spouse because of divorce or separation or as a result of a legal requirement. (Don't include support for children in your household).  
\$ \_\_\_\_\_
- c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of Fellowships and assistantships.  
\$ \_\_\_\_\_
- d. 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.  
\$ \_\_\_\_\_
- e. Combat pay or special combat pay.  
Only enter the amount that was taxable and included in your adjusted gross income.  
\$ \_\_\_\_\_
- f. Earnings from work under a cooperative program offered by a college (do not include any earnings from a Hofstra work program)  
\$ \_\_\_\_\_

**2010 Untaxed Income**

- a. 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.  
\$ \_\_\_\_\_
- b. 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.  
\$ \_\_\_\_\_
- c. Child support received for **all children**. (Don't include foster care or adoption payments).  
\$ \_\_\_\_\_
- d. Tax exempt interest income from IRS Form 1040 - line 8b or 1040A - Line 8b.  
\$ \_\_\_\_\_
- e. Untaxed portions of IRA distributions from IRS Form 1040 – lines 15a minus 15b or 1040A – lines 11a minus 11b. **Exclude rollovers.** If negative, enter "0"  
\$ \_\_\_\_\_
- f. Untaxed portions of pensions from IRS Form 1040 lines 16a minus 16b or 1040A lines 12a minus 12b. **Exclude rollovers.** If negative, enter "0".  
\$ \_\_\_\_\_
- g. Housing, food and other living allowances paid to members of the Military, clergy and others (including cash payments and cash value of benefits).  
\$ \_\_\_\_\_
- h. Veterans non-education benefits such as Disability Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.  
\$ \_\_\_\_\_
- i. Other untaxed income not reported, such as workers' compensation, disability, etc. **Also include the first-time homebuyer tax credit from IRS form 1040, line 67 and the first \$2400 of unemployment benefits received.** (Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay, (if you are a not a tax filer), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.  
\$ \_\_\_\_\_
- j. Money received, or paid on you behalf (e.g. bills), not reported elsewhere on this form.  
\$ \_\_\_\_\_

**Were you (your household) supported in 2010 by any form of income reported below? (do not include income already reported somewhere else on this form)**

\_\_\_yes \_\_\_no

Student financial aid, welfare, any kind of Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are a not a tax filer), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.