2012-2013 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 family 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 2012-2013 Free Application for Federal Student Aid (FAFSA) that is on file with Hofstra. If your FAFSA is selected for verification of 2011 income, this process must be completed first before Student Financial Services may process the re-evaluation.

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

1) **Signed and completed 2012-2013 Request for Re-evaluation Form** (the entire form must be completed or it may delay the processing time)

2) **Verification Documents:** (If filing after January 1st, 2013, 2012 tax return transcripts are required)
   - A. SIGNED copies of your/your spouse’s 2011 U.S. Federal Income Tax transcripts & all schedules (call 1-800-908-9946 to request tax transcripts)
   - B. Copy of your/your spouse’s 2011 W2 forms
   - C. Independent 2012-2013 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 2011 has lost employment in 2012, 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 2011 has lost that income for 2012. 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 your loss of income from appropriate agency
___ Most recent pay stubs (including your 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, 2013.
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 2011, 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 you (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 – 2012 Estimated Income**

List the names of all the places where you have worked during 2012 along with total earnings to date before taxes. Please report your total taxable and untaxed income beginning January 1, 2012 through today's date in Column B. Please list your estimated total taxable and untaxed income from tomorrow's date through December 31, 2012, in Column C.

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

<table>
<thead>
<tr>
<th>Name of Employer/Company or Source of Income</th>
<th>Actual Income from 01/01/2012 to today’s date <strong>/</strong>/__</th>
<th>Estimated Income from Tomorrow through 12/31/2012</th>
<th>Total 2012 Income (column B+C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student’s wages:</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Student’s unemployment compensation:</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Spouse’s wages:</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Spouse’s unemployment compensation:</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Severance Pay:</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other taxable income may include interest or dividend income, alimony, pensions, annuities,</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Business or farm income taxable social security (include benefits received by you for all your dependent children):</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Temporary Assistance for Needy Families (TANF):</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Child support received for all children</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other untaxed income and benefits (i.e. disability; workmen’s compensation; payment to tax deferred pension and savings plan such as 401(K) or 403(B) plans; housing, food, or other living allowances; maintenance income from a separated spouse; cash support provided to you and/or bills paid by others on their behalf.</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

*Section II must be complete in order to proceed with the Re-evaluation process*
SECTION III – Explanation of Circumstances

Use this space below to provide a detailed explanation of the circumstance(s) which will result in a significantly lower income in 2012, as compared to 2011. Attach additional sheets if necessary.

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

SECTION IV – Certification

We certify that all the information and documentation is accurate and complete. We agree to provide additional documentation if it is requested. We understand that reporting of this information could result in a change/loss of financial aid that has already been awarded on the basis of inaccurate information initially provided.

Student’s signature ___________________________ Date: ______________
Your application was selected for review in a process called “Verification.” In this process, your school will be comparing information from your FAFSA application with copies of you and your spouse’s 2011 Federal tax forms, or with W-2 forms or other financial documents. The law states we have the right to ask you for this information before awarding Federal aid. If there are differences between your FAFSA application information and your financial documents, you or Hofstra University school may need to make corrections electronically or by using your Student Aid Report (SAR).

Submit this information to the Office of Student Financial Services (Financial Aid) **immediately** since federal and/or University need-based aid awarded is **estimated** until this process is complete. Failure to complete verification in a timely manner may lead to cancellation of aid. Upon review of the documentation you submit, additional information may be required; notification of such will be made as quickly as possible. You will be notified if FAFSA corrections result in changes/cancellation of award(s).

1. Submit the completed **2012-2013 Independent Verification Form**. Make sure the form is **signed by the student**. This form is four-sided and needs to be filled out completely; if the answer is zero write “0”, do not leave blank.

2. If the number in household and/or college you are reporting now on the Verification Worksheet does not match the number(s) you reported on the FAFSA, submit a written explanation for the discrepancy which must be **signed by the student**.

3. Submit **2011 Federal Tax Transcript(s) and W2 forms** for both student and spouse, if filed. As per federal regulations, we can no longer accept copies of the filed federal tax return unless it is specifically requested by the financial aid department. **You can obtain a Federal Tax Return Transcript by calling the IRS at 1-800-908-9946.**

4. **IF FILED**: The following schedules and forms are required from your tax return:

   - **Schedule C** (business income)
   - **Schedule E** (property rental, royalties, S corps, trusts, etc)
   - **1099 R** (distributions from IRS, pensions and annuities etc).

5. **If Food Stamps** were received by any household member reported on this form for 2010 or 2011 submit supporting documentation to verify this, such as a copy of the Food Stamp Benefit Card.

### A. Student Information

<table>
<thead>
<tr>
<th>Last name</th>
<th>First name</th>
<th>M.I.</th>
<th>Hofstra ID Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address (include apt. #)</th>
<th>Date of birth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Phone number (include area code) / Cell</th>
</tr>
</thead>
</table>
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, 2012 through June 30, 2013, 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, 2012 through June 30, 2013

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, who will be attending at least half time between July 1, 2012 and June 30, 2013, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td></td>
<td>Self</td>
<td>Hofstra University</td>
</tr>
</tbody>
</table>

☐ Yes ☐ No Did you or someone in your household as indicated above, receive food stamps in 2010 or 2011? If yes, please identify which family member here ___________________ and submit supporting documentation to verify receipt such as a copy of the Food Stamp benefit card.

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

1. Check only one box below. Tax transcripts include the 2011 IRS transcript from filing Form 1040, 1040A, 1040EZ, and a tax return from Puerto Rico. Tax transcripts can be obtained by calling the IRS at 1-800-908-9946.

☐ Check here if you are attaching a copy of your tax transcript.
☐ Check here if a tax transcript will be submitted to the school by _______________ (date).
☐ Check here if you will not file and are not required to file a 2011 U.S. Income Tax Return. (Submit all W-2’s)

2. Funds received for child support and other untaxed income.

<table>
<thead>
<tr>
<th>Sources of Untaxed Income</th>
<th>2011 Amount</th>
<th>Sources of Untaxed Income</th>
<th>2011 Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Child Support</td>
<td>$</td>
<td>d.</td>
<td>$</td>
</tr>
<tr>
<td>b. Workman’s Compensation</td>
<td>$</td>
<td>e.</td>
<td>$</td>
</tr>
<tr>
<td>c. Untaxed Pensions</td>
<td>$</td>
<td>f.</td>
<td>$</td>
</tr>
</tbody>
</table>

3. If you did not file and are not required to file a 2011 Federal income tax return, list below your employer(s) and any income received in 2011 (You must provide the W-2 form or other earnings statements with this form).

<table>
<thead>
<tr>
<th>Sources</th>
<th>2011 Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
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<tr>
<td></td>
<td>$</td>
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<tr>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>
D. Spouse’s Tax Forms and Income Information (if student is married)

1. Check only one box below. Tax transcripts include the 2011 IRS transcript from filing Form 1040, 1040A, 1040EZ or a tax return from Puerto Rico. Tax transcripts can be obtained by calling the IRS at 1-800-908-9946.
   - [ ] Check here if you are attaching a copy of your spouse’s joint tax transcript.
   - [ ] Check here and attach spouse’s tax transcript if your spouse filed a separate tax return.
   - [ ] Check here if spouse’s tax transcript will be submitted to the school by ______________________ (date).
   - [ ] Check here if your spouse will not file and are not required to file a 2011 U.S. Income Tax Return. (Submit all W-2’s)

2. Funds received for child support and other untaxed income.

<table>
<thead>
<tr>
<th>Sources of Untaxed Income</th>
<th>2011 Amount</th>
<th>Sources of Untaxed Income</th>
<th>2011 Amount</th>
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<td>a. Child Support</td>
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<td>$</td>
<td>e.</td>
<td>$</td>
</tr>
<tr>
<td>c. Untaxed Pensions</td>
<td>$</td>
<td>f.</td>
<td>$</td>
</tr>
</tbody>
</table>

3. If your spouse did not file and is not required to file a 2011 Federal income tax return, list below your spouse’s employer(s) and any income received in 2011 (You must provide the W-2 form or other earnings statements with this form).

<table>
<thead>
<tr>
<th>Sources</th>
<th>2011 Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
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<tr>
<td></td>
<td>$</td>
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<td></td>
<td>$</td>
</tr>
</tbody>
</table>

E. Additional Financial Information and Untaxed Income

Use the tables below to report annual (not monthly) amounts as indicated on your 2011 TAX RETURN. Tax returns include the 2011 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If the amount is zero, write “0”, do not leave blank.

STUDENT’S 2011 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 you or your spouse you live with because of divorce or separation or as a result of a legal requirement. You must supply a statement from the payer of the child support indicating the annual amount of support and the names of the children for which the funds are being paid (The statement must be signed by both the payer and Hofstra student) | $ |
| 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 education program offered by a College (do not include earnings from any Hofstra work program). | $ |
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. (Must submit W2.)

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 in your household. (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. (Must submit 1099R)

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”. (Must submit 1099R)

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 elsewhere on this form, such as workers’ compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040, line 67. 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 your behalf (e.g. bills), not reported elsewhere on this form.

☐ Yes ☐ No Were you (your household) supported in 2011 by any form of income reported below? (do not include income already reported somewhere else on this form) Untaxed 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

F. 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

You may submit the verification and requested forms to:

Office of Student Financial Services
202 Memorial Hall
126 Hofstra University
Hempstead, NY  11549-1260
FAX: 516-463-4936 (Please make sure the student’s ID# appears on every page)
Email: studentfinancialservices@hofstra.edu

Questions? Please call 516-463-8000 and a Student Financial Services Representative will assist you.