

Student Name: \_\_\_\_\_

Williams ID: \_\_\_\_\_

## A. Guidelines

**Instructions:** Information presented in this request should be either new information or information that has changed significantly from your initial application. **Please complete all sections (A, B, and C)** of this form as completely and accurately as possible. If parents are divorced, separated, or never married and do not live together, each parent must complete an individual review form. **Process:** Our Financial Aid Review Committee reviews all requests on a rolling basis, and may request additional information through email prior to making a final decision. Aid applications must be complete, and an initial award should have been received prior to a request being reviewed. Response time will vary based on our volume of requests at the time your request is received, but our goal is to respond within two weeks. Once we determine whether an adjustment can be made, we email a revised award notification directly to the student. If the financial aid award is revised based on using projected income for 2018, you will be required to provide documentation of that income in January of 2019. If your actual 2018 income is greater than your projected 2018 income, your financial aid will be reduced.

## B. Reason for Review

Check the box below that most accurately describes your situation. You may check more than one.

- Significant loss of parent income due to change in employment circumstances. **Please provide the following:**
  - Date of wage reduction: \_\_\_\_\_. *If the parent becomes re-employed, you must notify our office within two weeks of the change.*
  - Submit your full 2017 federal tax return, including all pages, schedules, & W-2 statements.
  - Complete projected income worksheet on the next page.
  - Attach documentation of reduction, severance, and/or unemployment benefits, and most recent pay stub for each parent. *Financial aid review requests related to a parent's loss of income will be considered after at least eight weeks of unemployment.*
- Untaxed income or benefits received have been reduced or terminated. **Please provide the following:**
  - Date of termination or reduction: \_\_\_\_\_.  
Attach documentation from the agency providing the benefits.
- Extraordinary unreimbursed medical and/or dental expenses. **Please provide the following:**  
Detailed explanation with an itemized list of out-of-pocket expenses not covered by insurance.
- Eldercare expenses for the student's maternal or paternal grandparents. **Please provide the following:**
  - Detailed explanation and supporting documentation of the expenses.
- Parent educational loan expenses for the parent's own undergraduate or graduate education: \_\_\_\_\_. **Please provide the following:**
  - Attach most recent statement indicating type of loan, loan servicer, and monthly payment amount required, plus total payoff amount of loan/s.
- One-time lump sum income or capital gain/distribution in 2016. **Please provide the following:**
  - Explanation of the circumstances. Please note that the circumstances should be one-time occurrences in 2016, which did not occur in 2015, and are not expected again in 2017 or 2018.
- Death of a parent following application submission. Date: \_\_\_\_\_. **Please provide the following:**
  - Attach death certificate and documentation of any death benefits.
- Other. If none of the above categories describe your family's situation, attach an explanation of your circumstances with as much detail and documentation as possible. **If your situation involves a change in income, complete the Projected Income Section on the next page.**

**We will not consider the following circumstances for a review:**

- Expenses related to extracurricular activities, home and vehicle maintenance or purchase, consumer debt, and parent loans borrowed to finance sibling education, including graduate school.
- Unwillingness to contribute to educational expenses.
- Unwillingness for parent or student to borrow loans to help pay the contribution.

## C. Projected Income

Complete this section if this request is based on a loss of employment or any other income-related change. If parents are divorced, separated, or were never married and do not live together, each parent must complete and submit a separate form.

- Provide information for **all** categories of income, not just the types of income that have changed.
- Attach any documentation you have for your figures, such as your most recent pay stubs, a letter from your employer regarding severance package terms, unemployment benefit statement, etc. **Don't forget your completed 2017 federal tax return & W-2s.**
- **Actual income will be verified in 2019.** If changes were made to your financial aid based on your projections and the actual figures are higher than your projections, aid will be adjusted, and you may be required to repay financial aid received.
- Enter "0" if no income of a listed type is expected.

2018 Total Income		Actual 2018 Income (1/1/18 to Present)	Estimated 2018 Income (Present to 12/31/18)	Total 2018 Income
Parent 1 Name:	2018 work income <i>Include copy of most recent paystub</i>			
Parent 2 Name:	2018 work income <i>Include copy of most recent paystub</i>			
Severance compensation (if not included above)				
Unemployment compensation Amt/week _____ x # weeks _____				
Net income from self-employment <i>Include copy of current Cash Flow &amp; Balance sheet</i>				
Net income from farms, rents, partnerships, etc. <i>Please specify</i>				
Pensions/Annuities/IRA Withdrawals				
Interest and Dividend Income				
Capital Gains/State income tax refund/Alimony				
Payments to tax-deferred pension & savings plans <i>Include untaxed portions to 401k &amp; 403b plans</i>				
Social Security Benefits for <i>all</i> family members				
Disability benefits				
Worker's Compensation				
Child support received for <i>all</i> children				
Veterans Benefits				
Other untaxed income/benefits <i>Please specify source</i>				

The information provided on this form is accurate and complete to the best of our knowledge.

We have provided our complete 2017 federal tax returns, including all schedules and W-2 statements.

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

Parent Signature \_\_\_\_\_ Date \_\_\_\_\_