

Collection date: _____
In-person (initial): _____
Fax/Email (initial): _____
Mail (initial): _____

2016-2017 INCOME ADJUSTMENT WORKSHEET

NAME: _____

EMPL ID#: _____

Independent Student: If you and/or your spouse's current 2016 income is less than your 2015-year income, you may request an income adjustment if those changes result from circumstances such as the loss of employment, natural disaster, loss of untaxed income or benefit (Child support, etc.) or disability/illness in family, separation, divorce or death.

Dependent Student: If a dependent student and/or their parent(s) current 2016 income is less than the year 2015, the student may request an income adjustment if the income changes are a result of the loss of employment, natural disaster, loss of untaxed income or benefit (Child Support, etc.) or disability/illness in family, separation, divorce or death.

Required Documentation:

- ☐ **Petition Letter:** A mandatory typed and signed letter detailing the events leading up to the current situation. In this letter, the student must explain how living expenses will be met for the 2016 year (see attached guide).
- ☐ **2016-2017 Verification Worksheet:** 2016-2017 Verification Worksheets are available to print on the Brooklyn College website: www.brooklyn.cuny.edu> Current Students> Financial Aid> Resources and Forms> Forms. Please print and complete the worksheet that applies to you.
- ☐ **2015 W2 Forms** (and all schedules, if applicable): Submit copies of all W2 forms received in tax year 2015 and all schedules from 1040 Income Tax Return (Schedule C or E).
- ☐ **2015 IRS Tax Return Transcript** (required if you have not successfully utilized the Data Retrieval Tool on your online FAFSA): Order a Tax Return Transcript online at www.irs.gov/individuals/get-transcript. For INDEPENDENT students, provide a transcript for yourself (and your spouse, if married). For DEPENDENT students, provide a transcript for yourself and your parents.

Select one economic circumstance and provide the documentation specified below:

- ☐ A parent or student has experienced a significant loss of income in 2016 or 2017 due to a period of unemployment, termination of current employment, change of jobs, or a reduction of wages or hours from current employment. Submit an official signed letter from employer or HR Department, at least 3 consecutive final paystubs from most recent employers (if applicable), documentation of Unemployment Benefits from NYS Department of Labor (for non NYS residents, the equivalent from your state).
- ☐ A parent or student who earned money in 2015 has not been able to earn money in 2016 or 2017 due to disability or natural disaster that occurred in 2015 or 2016. Submit a statement from student or parent's employer, insurance company, Worker's Compensation Board, or other disability agency indicating when employment terminated; in cases of natural disaster: submit a statement explaining the nature of disaster & date employment terminated.
- ☐ You (or your parent, if dependent) legally separated or divorced after submitting your FAFSA. Submit a copy of divorce decree, or legal separation document, proof of separate addresses: copy of leases, current and prior utility bills indicating mailing addresses.
- ☐ A parent or student who received unemployment compensation or another type of untaxed income or benefit in 2015 or 2016 has completely lost that income or benefit in 2016 or 2017. The untaxed income or benefit must be from a public or private agency, from a company or from a person due to a court order. Submit a statement from the appropriate agency, company or person making the benefit payments indicating when the benefits terminated.
- ☐ Parent or spouse (if student is independent and married) has died after student filed a FAFSA. Submit a copy of death certificate and financial documents for yourself and/or surviving parent (current pay stub; social security statements, etc.).

Student/Parent Certification:

I/we hereby certify that all information submitted in support of this request for an income adjustment is true and complete to the best of my/our knowledge. I/we certify that I/we have not knowingly or intentionally provided any fraudulent documentation. I/we understand that if I/we are found to have intentionally given false statements, this request will be denied and the student's eligibility of Federal financial aid will be jeopardized.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

(Parent Signature required if student is dependent)

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Income Adjustment Petition Letter Sample:

Full Name:
CUNY EMPLID ID:
Date:

Attention: Financial Aid Office

Dear Committee Members,

The first sentences should clearly outline what you are requesting, including all pertinent information regarding, date of job termination (s) and start/end of unemployment benefits (if applicable).

For Example: I am requesting a petition for an income adjustment due to....

The body of the letter should include how living expenses are met after job termination

For Example: I am currently supporting myself and living expenses through the support of...

Sincerely,

(Must Include Wet Signature)

Please limit you appeal letter to 1-2 pages.