

2023-2024 Request for Professional Judgment

Your eligibility for financial aid was originally calculated based on the information provided on the 2023-2024 Free Application for Federal Student Aid (FAFSA). The FAFSA application uses 2021 income and other factors to measure the financial strength of the household for the 2023-2024 academic year. However, families experience changes in income or family situations not reflected on the 2021 tax return. You may submit a Professional Judgment request if you have a special circumstance and would like the information reported your 2023-2024 FAFSA to be re-evaluated.

INCOMPLETE REQUESTS CANNOT BE PROCESSED. Additional documentation may be required. A Professional Judgment request can take up to 30 business days to process.

A. STUDENT INFORMATION

Name (Print) _____ AU ID _____
Address _____ City _____ State _____
Zip Code _____ Phone # _____ E-mail _____

B. INDICATE THE REASON FOR YOUR REQUEST AND INCLUDE THE REQUIRED DOCUMENTS

If you are a dependent student, provide documentation for both you and your parent(s). If you are married, provide documentation for both you and your spouse. If you, your parent, or spouse did not file a 2021 and/or 2022 tax return, please submit an IRS Verification of Non-filing letter. If you have filed a tax extension, please submit your tax filing extension document (Form 4868).

The following documents are required for **ALL** Professional Judgment Requests:

Dependent Student	Independent Students
<input type="checkbox"/> Signed statement explaining reason for request	<input type="checkbox"/> Signed statement explaining reason for request
<input type="checkbox"/> 2021 and 2022 SIGNED student taxes with W-2's and applicable tax schedules (schedule 1,2,3)	<input type="checkbox"/> 2021 and 2022 SIGNED student taxes with W-2's and applicable tax schedules (schedule 1,2,3)
<input type="checkbox"/> 2021 and 2022 SIGNED parent taxes and W-2's and applicable tax schedules (schedule 1,2,3)	<input type="checkbox"/> 2021 and 2022 SIGNED spouse's taxes and W-2's and applicable tax schedules (schedule 1,2,3)

C. ADDITIONAL REQUIRED DOCUMENTATION (Check all that apply)

1. Loss of employment or significant reduction of income/pay

(Check all that apply)

☐ Student ☐ Spouse ☐ Mother/Stepmother ☐ Father/Stepfather

- ☐ If **recent change of employment** not reflected on 2021 tax return, upload letter of termination, and the most recent paycheck stub if working for a new employer.
- ☐ If **loss of employment** not reflected on 2021 tax return, upload a copy of the unemployment benefits statement or letter of termination.
- ☐ If there have been significant changes in the following due to the unusual circumstance indicate new amounts:
 - **Cash, savings, and checking:** Student/Spouse-\$_____ Parent-\$_____
 - **Net real estate/investment Value:** Student/Spouse-\$_____ Parent-\$_____
 - **Net business/farm value:** Student/Spouse-\$_____ Parent-\$_____

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2. Loss or change in the amount of child support, social security benefits or other benefits.

(Check all that apply)

☐ Student ☐ Spouse ☐ Mother/Stepmother ☐ Father/Stepfather

- ☐ If **benefits are terminated**, provide documentation of the monthly amount that was being paid and include the date of the last payment in the detailed personal statement along with an official statement from the agency reflecting cancellation of benefits.
- ☐ If **benefits are reduced**, provide documentation of the original amount and the new amount. Include the date the original amount ended and the date the new amount began in the detailed personal statement along with an official statement from the agency reflecting the change/reduction of benefits.

3. Divorce or separation of parents or spouse:

- ☐ Divorce Decree **or**
- ☐ Documentation of living at two separate addresses for at **least 6 months**. This may include drivers' licenses, mortgage statement, lease agreement, or utility bills.
- ☐ For **dependent students**, indicate which parent will be providing more than half of your financial support from July 1st, 2023, through June 30th, 2024 _____.
- ☐ If there have been significant changes in the following due to the unusual circumstance indicate new amounts:
 - o **Cash, savings, and checking:** Student/Spouse-\$_____ Parent-\$_____
 - o **Net real estate/investment Value:** Student/Spouse-\$_____ Parent-\$_____
 - o **Net business/farm value:** Student/Spouse-\$_____ Parent-\$_____

4. Death of parent(s) or spouse:

(Check all that apply)

☐ Student ☐ Spouse ☐ Mother/Stepmother ☐ Father/Stepfather

- ☐ Death Certificate

5. Extraordinary medical expenses NOT COVERED BY INSURANCE: (Extraordinary medical expenses must exceed 11% of the annual adjusted gross income and not be claimed as a deduction on the income tax return).

Only medical expenses PAID out of pocket are eligible for consideration.

- ☐ 2021 and/or 2022 IRS 1040 Tax schedule A if you itemized medical expenses AND
- ☐ 2021 and/or 2022 Receipts of **paid** medical or dental expenses, cancelled checks, or credit card statements.

6. Parent attending college

- ☐ Copy of parent's class schedule and tuition payment receipt

7. Student change in marital status

- ☐ Marriage certificate
- ☐ Include you and your spouse's 2021 income tax return, W-2 forms, and applicable tax schedules (1,2 and 3)
- ☐ If there have been significant changes in the following due to the unusual circumstance indicate new amounts:
 - o **Cash, savings, and checking:** Student-\$_____ Spouse-\$_____
 - o **Net real estate/investment Value:** Student-\$_____ Spouse-\$_____
 - o **Net business/farm value:** Student-\$_____ Spouse-\$_____

8. Other

- ☐ If none of the above-listed conditions provided apply to your situation, please provide a written, signed statement explaining your unusual circumstance. You must submit supporting documentation to verify the condition and verification of all income. **Not all requests will qualify for an adjustment.**

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D. HOUSEHOLD INFORMATION

Please list all the people in your household, including:

- Yourself, your spouse (if married), and your parents (if Dependent student).
- Other people living with you for which you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024 (Independent students only).
- Other people living with your parents for which they provide more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024 (Dependent students only).

Write the name of all household members below and list the college/university for those who will be attending at least half-time between July 1, 2023, and June 30, 2024. If you need additional space, attach a separate page.

Full name of Family Member	Age	Relationship to student	Attending college or university at least half-time between July 1, 2023 and June 30, 2024
		Yourself (student)	School: Averett University
			School:
			School:
			School:

E. ACKNOWLEDGEMENT

Professional Judgment requests are reviewed on a case-by-case basis, and not every outcome will result in the adjustment of a student's financial aid eligibility.

A Financial Aid Administrator may re-evaluate a student's cost of attendance (COA) if the student has unforeseen expenses that exceed the average annual budget established by the university. In these instances, the student's eligibility for need-based awards may not change but the student may become eligible for additional loans once the COA is increased.

The decision of the Financial Aid administrator is final and cannot be appealed.

F. SIGNATURES

All the information on this form is true to the best of my knowledge and I have attached the appropriate supporting documentation.

Student _____ AU ID _____ Date _____

Spouse _____ Last 4 digits of S.S.# _____ Date _____

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Mother/Stepmother _____ Last 4 digits of S.S.# _____ Date _____

Father/Stepfather _____ Last 4 digits of S.S.# _____ Date _____

SUBMISSION INSTRUCTIONS

- 1) Fax: 434-791-5647
- 2) Email: finaid@averett.edu
- 3) Mail: Student Financial Service
Averett University
420 West Main Street
Danville, VA 24541