

Submit directly to boschermurpc@mail.montclair.edu

Please Note:

- You must file a 2023—2024 Free Application for Federal Student Aid (FAFSA) and receive a financial aid notification before submitting this form
- Incoming new students must pay their Admissions Deposit

REQUEST FOR REVIEW - UNUSUAL CIRCUMSTANCES

2023 - 2024 ACADEMIC YEAR

SUBMIT no later than 10 days before your last day of class to allow for review and processing:

For Fall *only* students – 12/5/23; Spring term - 5/2/24

Complete this form if you have extenuating circumstances which have resulted in a reduction in resources or a decrease in disposable income for calendar year 2021, 2022 or 2023 which will impact your family's ability to contribute toward your educational expenses. If your circumstances changed in 2023, we will consider those after 6/30/23.

You must print out and complete ONLY the application page of this document (page 2).

Submit your application with the specific documentation listed for your circumstance on page 3.

NJ HESAA Grant eligibility has earlier deadlines

The office will only consider reductions in income for the circumstances listed in Sections A, B or C on the application. The following circumstances **will not be considered** for a reduction in income:

- Tuition paid for elementary/secondary private school
- Unusual expenses related to personal living (e.g. bills for repairs, wedding expenses, credit card bills, home mortgage or school loan payments, car payments, legal expenses, other miscellaneous consumer item expenses)
- Reductions in income resulting from bankruptcy proceedings
- Foreclosure of your primary home
- Pension/IRA distributions (unless COVID related with IRS form 8915-e)
- Medical expenses incurred but not paid

If the reason you are requesting a review is listed above, do not complete this form.

Once all documents are received, processing takes 7-10 days. Results will be posted in NEST – please monitor for changes under Financial Aid Requirements and Financial Aid Awards.

**REQUEST FOR REVIEW APPLICATION
UNUSUAL CIRCUMSTANCES
2023 - 2024 ACADEMIC YEAR**

Student Name: _____ ID#: __M_____

Complete Mailing Address: _____

Telephone #: _____ Student MSU Email Address: _____

A. Reduction of Income:

Please check the reason(s) that best describes your current situation. Indicate who suffered the change and the date that this change occurred. *Leaving this information blank may delay the processing of your request.*

_____ Loss of Employment or Wages:
_____ Student _____ Spouse _____ Father _____ Mother
Last Date of Employment: _____ Date expected to return to work: _____

_____ Loss of Unemployment or Untaxed Income Benefits:
_____ Student _____ Spouse _____ Father _____ Mother
Which type of benefits have ended: _____ Date: _____

_____ Separation or Divorce of Wage Earner(s):
Your parents or you and your spouse have separated or divorced since filing a joint tax return and/or since the FAFSA was filed. Date: _____

_____ Death or Disability of Wage Earner:
_____ Student _____ Spouse _____ Father _____ Mother Date: _____
If disability, please identify the condition: _____

B. Unusual Expenses:

_____ Unusual Medical/Dental Expenses claimed on Schedule A on 2021 or 2022 tax return

C. Rollover of IRA or Pension funds:

_____ A rollover of IRA or pension funds in the 2021 tax year is inflating the income reported.

Please provide any additional information to support your petition:

Student Signature: _____ Date: _____

Parent/Spouse Signature: _____ Date: _____

Required Documents for Request for Review (submit as pdf files):

You must submit the home copy (not IRS Transcript) of the *2021 and 2022 federal tax returns, pages 1 - 2 and Schedules 1 – 3 and A, B, C, D, E, F; no NJ return, no worksheets*. Typically, the tax return is 2-10 pages.

In addition to the 2021 and 2022 federal tax returns, please submit the documentation indicated below as required to support your request. We may request additional information once we review the file.

Loss of Employment or Wages:

- Statement (on company letterhead) from prior employer(s) stating termination dates [if applicable], AND
- Last pay stub(s) from all prior position(s), including vacation and severance pay, AND
- Most recent pay stub for current employer(s) [if applicable], AND
- Documentation of Unemployment benefits with amount or denial. Unemployed person must file (in NJ - <https://www.myunemployment.nj.gov/>)

Loss of Unemployment Compensation or Untaxed Income or Benefits:

- Statement from agency that terminated benefits indicating date of termination and total amount of benefits received for the current year

Separation/Divorce of Wage Earners:

- Copy of legal separation document/divorce decree, OR
- Signed statement from your attorney, OR
- Proof of different legal residence for the person who left the household (driver's license, apartment lease, utility bill (not a cell phone bill), etc.)
- Documentation of spousal and/or child support, if applicable
- W-2 Wage statements for the 2021 year

Death of Wage Earner:

- Death Certificate, OR
- Obituary notice, OR
- Bill from funeral home

Disability of Wage Earner:

- Amount of benefits (short and/or long term) received since disability began, AND
- Documentation of all other income earned or received for the current year

Unusual Medical/Dental Expenses:

- Schedule A from the Federal 1040 form for 2021 or 2022 as applicable, OR
- Credit card statements, receipts marked paid, or statements from the medical provider listing all payments

Rollover of IRA or pension funds:

- 1099-R form AND
- 2021 federal 1040 tax return page 1

NJ Grant deadlines are earlier each term