

2018-2019 Financial Aid Professional Judgment Checklist

If your financial situation has changed and you feel the income information on your FAFSA no longer accurately reflects your family's current income, you may consider submitting documents to be reviewed for a professional judgment. **Please note that every situation does not warrant a review nor does every review guarantee a change in any federal aid awards.**

- Unusual personal living expenses, personal indebtedness, and retirement are examples of circumstances that **do not** permit a professional judgment review.
- You must be able to provide **all** valid supporting documents in order for your FAFSA to be considered for review.
- Reviews for professional judgments are taken into consideration for financial situations that have taken place within the current academic year.
- A copy of the 2018-2019 Verification Worksheet can be found on Lindenwood's website: <http://www.lindenwood.edu/files/resources/2018-2019-verification-worksheet.pdf>

Current Financial Situation	Required Documents
<p style="text-align: center;">Loss of Employment</p> <p>The loss of employment must be due to no fault of your own: laid off, company downsized, outsourced position, medical reasons, etc.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> * Completed 2018-2019 Verification Worksheet <input type="checkbox"/> ** Signed copy of 2016 and 2017 IRS Federal Tax Return (student/parent) <input type="checkbox"/> Letter from student/parent requesting an income adjustment <input type="checkbox"/> Letter of termination from the employer; must state <u>WHY and WHEN</u> said person was terminated <input type="checkbox"/> Last check stub of person who lost his/her job <input type="checkbox"/> Itemized list of unemployment wages received (if applicable) <input type="checkbox"/> Copy of severance package (if applicable) <input type="checkbox"/> Most recent check stub of spouse/parent that is still working (if applicable) <input type="checkbox"/> Copy of 2016 and 2017 W2's or a signed statement

Current Financial Situation	Required Documents
<p>Death of a Spouse or Parent</p>	<ul style="list-style-type: none"> <input type="checkbox"/> * Completed 2018-2019 Verification Worksheet <input type="checkbox"/> **Signed copy of 2016 and 2017 IRS Federal Tax Return (student/parent) <input type="checkbox"/> Copy of death certificate <input type="checkbox"/> Copy of the surviving spouse or parent's 2016 and 2017 W2's or a signed statement (if they filed a joint tax return)
<p>Divorce or Separation</p> <p>This situation will only be considered IF you turn in ALL required documentation. If not, we will NOT be able to consider you "separated."</p>	<ul style="list-style-type: none"> <input type="checkbox"/> * Completed 2018-2019 Verification Worksheet <input type="checkbox"/> ** Signed copy of 2016 and 2017 IRS Federal Tax Return (student/parent) <input type="checkbox"/> Copy of 2016 and 2017 W2's or signed statement <input type="checkbox"/> Copy of divorce decree or legal separation documents <input type="checkbox"/> If NOT legally divorced or legally separated the following documentation must be turned in: <ul style="list-style-type: none"> <input type="checkbox"/> Two separate notarized letters, one from each spouse, stating month and year they were separated <input type="checkbox"/> One current utility bill from each spouse showing different addresses. We cannot accept bills such as cell phone, cable, internet, auto insurance, etc...
<p>Out of Pocket Medical Expenses</p> <p>This situation is only considered IF the out-of-pocket medical expenses paid exceed the 11 percent income protection allowance (IPA), which is already included in the EFC calculation on the FAFSA.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> * Completed 2018-2019 Verification Worksheet <input type="checkbox"/> ** Signed copy of 2016 IRS Federal Tax Return (student/parent) <input type="checkbox"/> Copy of itemized list or receipts of out-of-pocket medical expenses paid
<p>Tuition Expenses</p> <p>This situation is only considered IF the annual elementary or secondary school tuition exceeds 10 percent of the family's adjusted gross income.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> * Completed 2018-2019 Verification Worksheet <input type="checkbox"/> ** Signed copy of 2016 IRS Federal Tax Return (student/parent) <input type="checkbox"/> Copy of annual tuition payments for 2017-2018 school year (statement of payments must be on elementary or secondary letterhead)

Please submit documents to:

Lindenwood University Office of Student Financial Services • Upload all documents here:
<http://www.lindenwood.edu/admissions/student-financial-services/secure-file-transfer/>
209 South Kingshighway, St. Charles, MO 63301 • (636) 949-4923, Fax (636) 949-4924
2600 W. Main St., Belleville, IL 62226 • (618) 239-6256 • Fax (618) 239-6183