

## 2021-2022 Professional Judgement Request Form (Income Adjustment)

### SECTION A: STUDENT INFORMATION

Name:

TXWES ID:

There are instances when a student's Free Application for Federal Student Aid (FAFSA) may not reflect the family's current situation. These are special circumstances that may be considered that may impact the student's financial aid eligibility. In these rare cases, a financial aid administrator may exercise professional judgment to adjust data that determines the student's Expected Family Contribution and/or Cost of Attendance components. There must be a significant change to the family's income to be considered for a Professional Judgment.

Professional Judgment appeals are reviewed on a case-by-case basis, and require a letter of explanation and supporting documentation. You must submit all required documentation in order for the Professional Judgment to be reviewed. NOTE: You are required to complete the verification process prior to processing your professional judgment.

### SECTION B. REQUIRED VERIFICATION DOCUMENTS

#### Dependent Students

- 2021-2022 Dependent Verification Form
- Copy of your and your parent's signed 2019 IRS Tax Return Transcript or IRS Tax Return

#### Independent Students

- 2021-2022 Independent Verification Form
- Copy of your and (your spouse's) signed 2019 IRS Tax Return Transcript or IRS Tax Return

### SECTION C. PROFESSIONAL JUDGEMENT REQUEST (Check all that apply)

#### DECREASE IN INCOME

*We review decrease in income that took place for at least 12 consecutive weeks after Jan. 1, 2019, as a result of job loss, retirement, death/disability, or other wage reduction.*

#### REQUIRED DOCUMENTS:

- Signed and dated letter on company letterhead from employer listing last date of employment, total earnings from January 1, 2019, through the last date of employment.
- Copy of last pay stub.
- Documentation of severance/benefits/unemployment compensation.
- Copy of your or your parents signed 2019 and 2019 IRS Tax Return or Tax Return Transcript and W2(s).
- All supporting documentation.

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

TXWES ID: \_\_\_\_\_

**LUMP SUM DISTRIBUTION**

*Lump sum distribution or non-recurring income in 2019 has inflated your or your parents Adjusted Gross Income. Please note that in some cases, not all distributions or non-recurring income can be removed under Professional Judgment.*

REQUIRED DOCUMENTS:

- Please indicate amount here \$\_\_\_\_\_.
- Copies of your or your parent's signed 2019 IRS Tax Return or Tax Return Transcript, an itemized statement detailing how this additional income was spent, and a 1099-R if applicable.

**DIVORCE/SEPARATION**

REQUIRED DOCUMENTS:

- Copy of separation, divorce decree, or copy of mortgage/lease proving separate residences.
- Copy of W2(s) and 2019 IRS Tax Transcript if taxes were filed jointly.

**DEATH OF PARENT OR SPOUSE**

*Your spouse/parent passed away after the FAFSA was complete.*

REQUIRED DOCUMENTS:

- *Death certificate of the deceased individual.*
- *Documentation of any death benefits received.*

**SECTION D. CERTIFICATION AND AUTHORIZATION**

If circumstances change, I/we accept the responsibility for contacting the Office of Financial Aid in writing with the corrected information. I also understand that submitting this form late in any term may eliminate potential eligibility due to processing time, awarding, and disbursement requirements. All submitted documentation becomes part of the official record and therefore cannot be returned. Documents that become part of the Education Record are protected for privacy under federal law.

I certify that all the information contained on this form and in the supporting documentation is complete and correct. I understand that I must complete all sections, sign and return this form for my appeal to be processed for financial aid consideration. I understand that it may take 5 – 7 business days for this request to be processed. Electronic signatures are not accepted.

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date