





## 2020-2021 Professional Judgment Appeal Request

Student Name: \_\_\_\_\_ Campus ID: \_\_\_\_\_

1. \_\_\_\_\_ **Minimum 20% Reduction of 2020 Income**

**2020 income changes due to termination/layoff from job cannot be accepted until after July 1<sup>st</sup>, 2020. If you are self-employed, earn bonuses, earn commission, or receive overtime pay, the committee may not be able to accurately evaluate your appeal without a copy of your 2020 tax return transcript(s),**

Reasons for consideration include: Terminations/Layoff from job, significant reduction of work hours, retirement or return to school full time.

Documentation to Include: Signed and dated letter from employer on company letterhead listing the last date of employment, documentation of total earnings from **former** employers from January 1st 2020 through date of unemployment (**if applicable**) in the **form of last paystub or 2020 W-2(s)**, documentation of severance/benefits/unemployment compensation, copy of most recent paystub from **current** employers, documentation of start date of current employment (if applicable), documentation of retirement income, and documentation of unemployment from 2020. If you have questions about what documentation to provide, please [contact](#) your assigned financial aid counselor.

2. \_\_\_\_\_ **Unique medical expenses totaling more than 20% of income in 2020**

Reasons for consideration include: Medical expenses paid, not just incurred, in 2020 and were not covered by health/dental insurance.

Documentation to include: Proof of payment (receipts/cancelled checks) made by student, spouse (if married), parents (if dependent). Invoices are not sufficient documentation. You must submit proof that the medical expenses were paid in 2020.

3. \_\_\_\_\_ **Loss of untaxed income of at least 20% in 2020**

Reasons for consideration include: Loss of child support, disability benefits, or other untaxed income.

Documentation to include: Documentation of termination of benefits from benefit provider. Other documentation as applicable, examples include a divorce decree, court order, etc.

4. \_\_\_\_\_ **Separation or Divorce of: \_\_\_\_\_ Parent or \_\_\_\_\_ Spouse after filing 2020-2021 FAFSA (Separation must be before 7/1/2020)**

Reasons for consideration include: Parent (if dependent) or spouse (if independent) no longer residing in the household due to separations or divorce.

Documentation to include: All W-2's must be submitted to verify separation of income. Separation agreement, divorce decree, or substantial evidence (copy of mortgage/lease, utility bills, etc.) proving parent (if dependent) or spouse (if independent) is residing in separate residence. Parties in question living in the same dwelling WILL NOT be considered.

5. \_\_\_\_\_ **Student Marriage after filing 2020-2021 FAFSA (Marriage must be before 7/1/2020)**

Reasons for consideration include: Student was single at the time they filed the FAFSA but is now married.

Documentation to include: Copy of marriage certificate, copy of spouse's 2017 tax transcript and copy of spouse's 2018 W-2's. Copy of 2018 IRS Statement of Non-filer letter (if applicable).

6. \_\_\_\_\_ **Death of: \_\_\_\_\_ Parent or \_\_\_\_\_ Spouse after filing 2020-2021 FAFSA**

Reasons for consideration include: Parent (if dependent) or spouse (if independent) deceased after student filed 2020-2021 FAFSA.

Documentation to include: Copy of death certificate and documentation of death benefits.

7. \_\_\_\_\_ **Parent of Dependent Student also attending College for 2020-2021 aid year**

Reasons for consideration include: Parent of UMBC student is degree seeking at a post-secondary institution. Parent must be enrolled at least ½ time (usually 6 credits) in a degree seeking program and have been counted in the 2020-2021 FAFSA household size.

Documentation to include: Official class schedule (copy) from parent's educational institution.



## 2020-2021 Professional Judgment Appeal Request Student Asset Information

### Student Information

Please print clearly—illegible documents cannot be processed. The information provided on this form will be compared against the 2020-2021 FAFSA. Please enter the information that was accurate as of the date the student first submitted the 2020-2021 FAFSA. For example, if the FAFSA was filed on October 1, 2019, the information provided on this form should be what was true as of October 1, 2019.

Student Name: \_\_\_\_\_ Campus ID: \_\_\_\_\_

Asset	Current Net Worth	Does this match what you entered on the 2020-2021 FAFSA? Yes/No
<i>Please report the requested information as of the date the student filed the 2020-2021 FAFSA.</i>	<i>Net worth means the current value minus debt. If the net worth is negative, enter \$0. Enter \$0 for assets listed that you do not own. If the statement does not apply, enter \$0.</i>	<i>Write: Yes or No. Provide an explanation if the answer is no.</i>
Current Savings Account Balance	\$	
Current Checking Account Balance	\$	
Real Estate Investment (not including the home you live in)	\$	
Trust Funds	\$	
Money Market Finds	\$	
Mutual Funds	\$	
Certificates of Deposits	\$	
Stocks	\$	
Stock Options	\$	
Bonds	\$	
Education IRAs	\$	
College Savings Plans	\$	
Business Value*	\$	
Investment Farm Value	\$	

*\*Only include the value of a small business that your parent(s) and/or your step-parent own and control AND that has more than 100 full-time employees or full-time equivalent employees. Family owned- and controlled means that more than 50% of the business is owned by person who are directly related or were related by marriage (family members do not have to be counted in the household size for the questions. Otherwise enter \$0.*

I certify that all of the information provided is true and accurately represents my net worth as of the day I filed the FAFSA. I understand that I may be required to provide additional documentation to verify our asset information.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## 2020-2021 Professional Judgment Appeal Request Parent Asset Information—Dependent Students Only

Please print clearly—illegible documents cannot be processed. The information provided on this form will be compared against the 2020-2021 FAFSA. Please enter the information that was accurate as of the date the student first submitted the 2020-2021 FAFSA. For example, if the FAFSA was filed on October 1, 2019, the information provided on this form should be what was true as of October 1, 2019.

Student Name: \_\_\_\_\_ Campus ID: \_\_\_\_\_

Parent Asset	Parent Current Net Worth	Does this match what you entered in the student section of the 2020-2021 FAFSA? Yes/No
<i>Please report the requested information as of the date the student filed the 2020-2021 FAFSA.</i>	<i>Net worth means the current value minus debt. If the net worth is negative, enter \$0. Enter \$0 for assets listed that you do not own. If the statement does not apply, enter \$0.</i>	<i>Write: Yes or No. Provide an explanation if the answer is no.</i>
Current Savings Account Balance	\$	
Current Checking Account Balance	\$	
Real Estate Investment (not including the home you live in)	\$	
Trust Funds	\$	
Money Market Finds	\$	
Mutual Funds	\$	
Certificates of Deposits	\$	
Stocks	\$	
Stock Options	\$	
Bonds	\$	
Education IRAs	\$	
College Savings Plans	\$	
Business Value*	\$	
Investment Farm Value	\$	

*\*Only include the value of a small business that your parent(s) and/or your step-parent own and control AND that has more than 100 full-time employees or full-time equivalent employees. Family owned- and controlled means that more than 50% of the business is owned by person who are directly related or were related by marriage (family members do not have to be counted in the household size for the questions. Otherwise enter \$0.*

We certify that all of the information provided is true and accurately represents our net worth as of the day the student filed the FAFSA. We understand that we may be required to provide additional documentation to verify our asset information.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## 2020-2021 Professional Judgment Appeal Request 2020-2021 Verification Form- Independent

Student Name: \_\_\_\_\_ Campus ID: \_\_\_\_\_

**Family Information**

List the people in your household. Include:

- Yourself and your spouse, if married
- Your children, if you will provide more than half of their support from July 1<sup>st</sup>, 2020 through June 30<sup>th</sup>, 2021; and
- And other people who live with you and receive more than half their support from you and will continue to live with you and receive more than half of their support from you through June 30<sup>th</sup>, 2021.

**Write the names of the household members.** Also write the name of the college for any household member who will be attending college at least half time (6 credits) between July 1<sup>st</sup>, 2020 and June 30<sup>th</sup>, 2021. If you need more space, attach a separate page.

Full Name	Age	Relationship	Name of College	Will be enrolled at least half time? Yes or No
		SELF	UMBC	

**The household information above will be compared against your FAFSA application. Since this statement is being provided after the FAFSA, it will be accepted as most current and accurate. If necessary, our office will update your FAFSA.**

**Tax Filing Status**

Student

Spouse (if married)



I have completed a 2018 Federal Tax Return.



I worked in 2018 but was not required to file a 2018 Federal Tax Return. I am submitting:

1. An Income Verification Form
2. Copies of all my W2s. For any wages earned that a W2 was not received, I am providing an explanation on the Income Verification Form for why a W2 is not available.
3. \*A Verification of Non-filing Letter from the IRS (or other foreign government).



I did not work in 2018.

**\*Additional Requirement for student and/or spouse who did not work:** Submit a Verification of Non-filing Letter from the IRS (or other foreign government).

\*The Verification of Non-filing Letter must be dated later than October 1, 2019 and can be requested on line at [www.irs.gov](http://www.irs.gov) by selecting 'Get a Tax Transcript' and following the prompts to obtain the letter. Alternately, it may be obtained using the paper IRS Form 4506-T and checking box 7. DO NOT request the IRS send the letter directly to UMBC.

**Signatures**

Warning: If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. Signing this document certifies the information reported is correct and accurate.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## 2020-2021 Professional Judgment Appeal Request 2020-2021 Verification Form- Dependent

Student Name: \_\_\_\_\_ Campus ID: \_\_\_\_\_

**Family Information**

List the people in your parent's household. Include:

- Yourself and your parent(s), including stepparent, even if you do not live with your parent(s). If your legal parents are separated and not living together, or if you are not sure who to list, please use the following chart to determine which parent(s) to include on this form: <https://studentaid.ed.gov/sa/sites/default/files/who-is-my-parent.png>
- Your parent's children, even if they do not live with your parent(s) if:
  - Your parent will provide more than half of their support from July 1<sup>st</sup>, 2020 through June 30<sup>th</sup>, 2021; OR
  - The children would be required to provide parental information when applying for federal aid
- Any other people who live with your parents and your parents provide more than half their support and will continue to live with and provide more than half of their support through June 30<sup>th</sup>, 2021.

**Write the names of the household members.** Also write the name of the college for any household member who will be attending college at least half time (6 credits) between July 1<sup>st</sup>, 2020 and June 30<sup>th</sup>, 2021. If you need more space, attach a separate page.

Full Name	Age	Relationship	Name of College	Will be enrolled at least half time? Yes or No
		<b>SELF</b>	<b>UMBC</b>	

**The household information above will be compared against your FAFSA application. Since this statement is being provided after the FAFSA, it will be accepted as most current and accurate. If necessary, our office will update your FAFSA.**

**Tax Filing Status**

Student

Parent



I have completed a 2018 Federal Tax Return.



I worked in 2018 but was not required to file a 2018 Federal Tax Return. I am submitting:

1. An Income Verification Form
2. Copies of all my W2s. For any wages earned that a W2 was not received, I am providing an explanation on the Income Verification Form for why a W2 is not available
3. **\*Additional Requirement for parents who did not file:** A Verification of Non-filing Letter from the IRS (or other foreign government).



I did not work in 2018.

**\*Additional Requirement for parents who did not work:** Attach a Verification of Non-filing Letter from the IRS (or other foreign government).

\*The Verification of Non-filing Letter must be dated later than October 1, 2019 and can be requested on line at [www.irs.gov](http://www.irs.gov) by selecting 'Get a Tax Transcript' and following the prompts to obtain the letter. Alternately, it may be obtained using the paper IRS Form 4506-T and checking box 7. DO NOT request the IRS send the letter directly to UMBC.

**Signatures**

Warning: If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. Signing this document certifies the information reported is correct and accurate.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_