If your family has experienced a major reduction in income, the Financial Aid Office may be able to reevaluate your financial need based on your 2016 income or your total projected 2017 income. Please realize that aid funds are limited and, if additional aid is available, it will usually take the form of a new or increased loan.

Because many situations require your final 2016 income data, you must wait until after 1/1/2017 to submit this form, but you may begin collecting the data earlier.

- If you had to provide parent data on your FAFSA, complete this form as a “Dependent” student.
- If you were not required to provide any parent data on your FAFSA, then you are an “Independent” student.

Please provide as much information as possible. Each request is evaluated on a case-by-case basis. Because of the individualized nature of these requests, we may need to request additional information. If we do, we will contact you after our initial review.

**Frequently Asked Questions**

1) If I submitted an approved Special Conditions Form for 2016-17, do I need to resubmit all of my documents?

If we reevaluated your eligibility for 2016-17 aid based on projected 2016 income, we need final tax data to evaluate your 2017-18 eligibility. Please submit this form, and the documents requested in Part II and IV. If you have not yet filed 2016 taxes, please keep in mind that you will be required to submit them once they are complete. If you previously submitted the 2015 tax documentation listed in Part 4, you don’t need to resubmit it.

2) What if I can't get my 2016 tax transcript yet?

We strongly prefer that you submit a 2016 tax return (IRS Form 1040, 1040A, or 1040EZ). If that's not available, please submit as much documentation of your 2016 income as possible including but not limited to 2016 W-2s and final paystubs.

You will still be required to submit a copy of your 2016 tax transcript by June 1st, 2017 or your aid will be canceled.

3) What if I have business, self-employment, or irregular income?

**For reductions in 2016 income:**
We are unable to accurately predict business or self-employment income without your final federal tax return. For earliest consideration, please submit a copy of your (or your parents) 2016 tax return (IRS Form 1040, 1040A, 1040EZ). You will be required to submit final tax transcripts by June 1st, 2017 or your aid will be canceled.

**For reductions in 2017 income:**
We are unable to accurately project irregular income (self-employment, businesses, overtime or irregular hours) before the year is over. We can’t process your request until you have filed your 2017 taxes and can provide a Tax Transcript. If your request is submitted in 2018, we can usually retroactively award you any federal aid for which you were eligible for fall 2017.

4) What if I have a tax extension for 2016?

Please follow the instructions in Part II and question 2 above for submitting year-end tax data (W-2s, etc). If you are unable to provide a final 2016 tax transcript data by 6/1/2017 because of an approved tax extension, you must:

Submit a copy of your **2016 IRS form 4868** by 6/1/2017.

Please keep in mind that if there were any errors in the data you provided for 2016, we may have to reduce your aid. These changes will occur after your aid has disbursed for the fall semester and may result in a balance to the university which may prevent students from registering for spring classes if not paid immediately.
TU 2017-18 Special Conditions Form

Part I – Household Information

<table>
<thead>
<tr>
<th>Student Name (Last, First, M.I.)</th>
<th>TU ID #</th>
</tr>
</thead>
</table>

1) Complete Section A or Section B:

**A. Parent(s) Of Dependent Students:**

1) Marital Status of Your Legal Parents:

- [ ] Married or Remarried (including stepparents)
- [ ] Divorced or Separated & Living Apart
- [ ] Widowed
- [ ] Unmarried and Both Parents Living Together including divorced, separated, and never married parents. (Only choose this option if your parent is living with someone that s/he is not currently married to and that person is your biological or legal parent as defined by the laws in your state.)

2) List all the people in your parents’ financial household from July 1, 2017 to June 30, 2018.

- Include yourself & your parent(s) as defined above. If your parent is remarried, you must include your stepparent’s data.
- Include your parents’ other children if your parents will provide more than half of their support from 7/1/2017 to 6/30/2018, or if the children would be required to provide your parents’ information if they were completing a 2017-2018 FAFSA. Include children who meet either of these standards, even if they don’t live with your parent(s) or are too young to attend college.
- Only include other people if they will live with your parent(s) and will receive more than half of their financial support from them from July 1, 2017 through June 30, 2018.

OR

**B. Independent Students:**

1) Student Marital Status:

- [ ] Single
- [ ] Married / Remarried
- [ ] Married, but separated
- [ ] Divorced or Widowed

2) List the people in your financial household.

- Include yourself (and your spouse). (If you are separated, do not include your spouse or his/her data on this form.)
- Include your children if you will provide more than half of their support from July 1, 2017 through June 30, 2018, or if the children would be required to provide your parental information if they were completing a 2017-2018 FAFSA. Include children who meet either of these standards, even if they do not live with you.
- Include other people if they will live with you and receive more than half of their financial support from you from July 1, 2017 through June 30, 2018.

2) Complete all columns for every household member. Don't leave “Age” or “Relationship” blank.

<table>
<thead>
<tr>
<th>Example Household Members</th>
<th>Relationship</th>
<th>Full Name</th>
<th>Age</th>
<th>Will they attend college at least half-time?</th>
<th>If yes, list College Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>TU Student</td>
<td>Self</td>
<td></td>
<td></td>
<td>Not Applicable</td>
<td>Towson University</td>
</tr>
<tr>
<td>Father/Mother/Stepparent</td>
<td></td>
<td></td>
<td></td>
<td>Not Applicable</td>
<td>See Parent in College form.</td>
</tr>
<tr>
<td>Student's Spouse</td>
<td></td>
<td></td>
<td></td>
<td>Yes1 □ □ No</td>
<td></td>
</tr>
<tr>
<td>All other siblings,</td>
<td></td>
<td></td>
<td></td>
<td>Yes1 □ □ No</td>
<td></td>
</tr>
<tr>
<td>children or dependents</td>
<td></td>
<td></td>
<td></td>
<td>Yes1 □ □ No</td>
<td></td>
</tr>
<tr>
<td>who meet the criteria</td>
<td></td>
<td></td>
<td></td>
<td>Yes1 □ □ No</td>
<td></td>
</tr>
<tr>
<td>defined above in Section A or B.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 Only check “Yes” for college if they will be seeking a degree or certificate and attending at least half-time between 7/1/2017 and 6/30/2018.

2 If they are undecided about which college they will attend, please list the names of ALL the colleges they are considering at the bottom of this page or on an attached separate sheet with your name and TU ID number.
Part II - Adjustment Type

Check all the conditions below that describe your situation and attach the required documentation.

- Parent or spouse of student died after filing 2017-18 FAFSA.
  - Enter the date of death: _______________  Attach a copy of the death certificate.
- Parents have separated or a married independent student has separated, after filing 2017-18 FAFSA.
  - Enter date of marital separation: _______________.
  - Attach a copy of legal separation agreement or official letter from attorney stating when legal proceedings will begin.
- Loss of one-time income source received in 2015 (i.e. severance, 401k distribution, pension distribution, etc)
  - Source of income: _______________.
  - Attach supporting documentation of lost income source
- Untaxed income received in 2015 has ceased or has been reduced (i.e. child support ended).
  - Enter date of change: _______________.
  - Attach supporting documentation of lost untaxed income. (Example: Divorce agreement for child support change.)
- Parent, spouse or student suffered permanent and total disability after January 1, 2016.
  - Enter date of disability: _______________.
  - Attach a signed letter from a physician stating the extent and duration of disability
  - Attach documentation of year-to-date income
  - Attach a Disability Benefit Statement from the Social Security Administration
- Parents of a dependent student or an independent student (and spouse, if married) experienced a significant reduction in annual income since 2015 because of job loss or reduction in pay/hours.
- Parent/spouse/student reported unusually high medical expense deductions on their 2015 or 2016 federal tax return.
  - Which year were they highest?  __2015___ __2016__
  - Submit your official 2015 or 2016 IRS Tax Transcript and a copy of your IRS Schedule A (Itemized Deductions)
  - We can only consider medical expenses that were already reported on your federal tax return.

Part III – Required Documentation (forms without documentation will not be reviewed)

1) Explanation of Special Circumstances (to be completed by parent or independent student): Please provide specific details about the changes in your financial situation since 2015. Include a timeline of any income changes and relevant employer names.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

(ATTACH ADDITIONAL SHEET IF NECESSARY)
2) Will your total annual household income be lowest for 2016 or 2017 (check one)  
___ 2016  ___ 2017

3) Provide the required documentation for the year you selected above.

**Required Documentation for 2016:**

- □ Dependent Students: Parents 2016 IRS Tax Transcript and 2016 W2s
- □ Independent Students: Student (and spouse, if married) 2016 IRS Tax Transcript and 2016 W2s

**Temporary Alternatives to Tax Transcript:**

1. If you are not able to file your 2016 taxes and submit a Tax Transcript to TU by 3/1/2017, you may temporarily submit copies of your completed 2016 Tax Return (1040EZ, 1040, or 1040A) **(Best temporary alternative)**

2. If you have self-employment or business income, you must attach your Tax Transcript or Tax Return.

3. If you do not have self-employment or business income and you are unable to complete your 2016 tax return by 3/1/2017, you may submit copies of your 2016 W-2s, final paystubs, and other documentation of final income.

You must still submit your final 2016 Tax Transcript by 6/1/2017, or we will be forced to cancel all of your aid.

**Required Documentation for 2017:**

- □ Employer letter/document stating when your employment ended or changed.
- □ Unemployment Benefits Statement
- □ Final Paystub from prior job (with details about your current and year-to-date earnings)
- □ Most recent pay stubs from all current jobs for student and parents or spouse.
- □ Estimated 2017 Worksheet in Part IV (next page)

If you have self-employment income, business income, inconsistent hours, or overtime pay, we may not be able to process your request until your 2017 taxes have been filed.

4) All students must attach all of the documentation listed below.

- □ Student’s 2015 IRS Federal Income Tax Return Transcript*
- □ Student’s 2015 W2 (or 1099) forms for all 2015 employers
- □ If student did not file, IRS “Verification of Non-filing Letter”

**Dependent Students must also submit:**

- □ Parent’s 2015 IRS Federal Income Tax Return Transcript(s)*
  
  (If your parents didn’t file a joint return we need Tax Transcripts for both parents from part I.)
- □ Parent’s 2015 W2 (or 1099) forms for all 2015 employers
- □ If parent’s did not file, IRS “Verification of Non-filing Letter”

**Married Students must also submit:**

- □ Spouses 2015 IRS Federal Income Tax Return Transcript*
- □ Spouses 2015 W2 (or 1099) forms for all 2015 employers
- □ If spouse did not file, IRS “Verification of Non-filing Letter”

*You must obtain your 2015 IRS Tax Transcripts from the IRS. Visit www.irs.gov/transcript or call 1-800-908-9946.

If you submit this form after 1/1/2018, we must usually request copies of your 2017 W2 or 1099 forms listed above, and if available your 2017 Tax Transcripts or signed copies of your 2017 Tax Returns (1 page EZ or 2 page 1040/1040A).
Part IV- Estimated 2017 Income

If your total 2017 income will be lower than your 2016 income, you must complete this section.

- Complete both tables. Report all of your income before exemptions, adjustments, and deductions.
- Include all income/benefits that you or your parents/spouse expect to receive from 1/1/2017 through 12/31/2017.
- Complete all items. If an item doesn’t apply, you must enter “0”.

### 2017 Estimated Gross Taxable Income

<table>
<thead>
<tr>
<th></th>
<th>Dependent Students Only:</th>
<th>Father</th>
<th>Mother</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Independent Students Only:</td>
<td>Student</td>
<td>Spouse</td>
</tr>
<tr>
<td>1. Wages, salaries, tips (include severance pay)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Pensions and annuities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Interest and dividends and capital gains</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Business or farm income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Social Security benefits (taxable)</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Income received from rents after expenses (mortgage interest, taxes, and insurance)</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Alimony</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Unemployment compensation</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Any other taxed income</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total 2017 Estimated Taxed Income (1 - 9)</strong></td>
<td>$</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 2017 Estimated Untaxed Income

<table>
<thead>
<tr>
<th></th>
<th>Dependent Students Only:</th>
<th>Father</th>
<th>Mother</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Independent Students Only:</td>
<td>Student</td>
<td>Spouse</td>
</tr>
<tr>
<td>1. Payment to tax deferred pension and savings plans (paid directly or withheld from earnings). Including, but not limited to, amounts reported on the W-2 forms in Boxes 13a through 13d, codes D,E,F,G,H and S.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Deductible IRA and/or Keogh, SEP, and SIMPLE payments.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Child Support received for all children.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Tax exempt interest income.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Untaxed portions of IRA distributions.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Untaxed portions of pensions.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Living and housing allowances for clergy, military and others.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Include cash payments or cash value of benefits.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Exclude rent subsidies for low income housing.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2016. Do not report any military housing benefits (BAH, BAQ, or the value of on-base military housing).</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Veteran’s Non-educational benefits such as Disability, Death Pension, or Dependency &amp; Indemnity Compensation (DIC) and /or VA Educational Work-Study allowances.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Any other untaxed income and benefits such as Workers Compensation, disability, etc.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Cash support or money paid on behalf of the student or the family.</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Cash or any money paid on your behalf, not reported elsewhere on this form.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>List Type:</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>List Type:</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>List Type:</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total 2017 Estimated Untaxed Income (1-12)</strong></td>
<td>$</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part V - CERTIFICATION

Because many situations require your final 2016 income data, you must wait until 1/1/2017 to submit this form.

☐ I understand that I must submit this form after 1/1/2017.

☐ I certify that the information on this form is true and correct to the best of my knowledge and belief.

☐ I understand that if I underestimate my income, I may have to repay any aid that I receive based on that data

☐ I understand that your office may need to request additional documentation.

Student Signature_________________________________________ Date________________________

Parent Signature_________________________________________ Date________________________

Name of Parent (please print)__________________________________________

You will receive a response to this request approximately 4 weeks after receipt of all required documentation.

<table>
<thead>
<tr>
<th>Mail or</th>
<th>Fax or</th>
<th>In Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Towson University Financial Aid 8000 York Road Towson, MD 21252-0001</td>
<td>410-704-2584</td>
<td>Enrollment Services Center Room 339 Monday – Thursday 8:00 – 5:00 Friday 8:00 – 4:30</td>
</tr>
</tbody>
</table>

Please do not submit forms by email.

Instead of calling to confirm receipt of faxes:
• Please wait at least 2 business days.
• Then check your online To-Do-List.