

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 2021 income or your total projected 2022 income. Please realize that grant funds are limited and, if additional aid is available, it will often take the form of a new or increased loan.

Because many situations require your final 2021 income data, **you must wait until after 1/1/2022 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, complete this form as 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 2021-22, do I need to resubmit all my documents?**

If we reevaluated your eligibility for 2021-22 aid based on projected 2021 income, we need final tax data to evaluate your 2022-23 eligibility. Please submit this form, and the documents requested in **Part II and IV**.

If you haven't filed your 2021 taxes yet, please keep in mind that you must send us copies of those tax returns once they are complete.

#### **2) What if I have business, self-employment, or irregular income?**

##### For reductions in 2021 income:

We are unable to accurately predict business or self-employment income without your final federal tax return. Please submit a copy of your (or your parents) 2021 tax return.

##### For reductions in 2022 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 2022 taxes and can provide a Tax Return. If your request is submitted in 2023, we can usually retroactively award you any federal aid for which you were eligible for fall 2022.

#### **3) What if I have a tax extension for 2021?**

Please follow the instructions in Part II and provide your 2021 year-end tax data (i.e. W-2s, final paystubs). If you are unable to provide a final 2021 tax transcript data by 6/1/2022 because of an approved tax extension, you must:

Submit a **copy of your [2021 IRS form 4868](#)** by 6/1/2022.

Please keep in mind that if there were any errors in the data you provided for 2021, we might 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 2022-23 Special Conditions Form

## Part I – Household Information

Student Name (Last, First, M.I.):	TU ID #:
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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)     **Single Parent/ Never Married**  
 **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, 2022 to June 30, 2023.**

- 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 **7/1/2022 to 6/30/2023**, or if the children would be required to provide your parents' information if they were completing a **2022-2023 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, 2022** through **June 30, 2023**.

**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, 2022 through June 30, 2023, or if the children would be required to provide your parental information if they were completing a 2022-2023 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, 2022** through **June 30, 2023**.

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

Example Household Members	Relationship	Full Name	Age	Will they attend college at least half-time?	If yes, list College Name <span style="color: red; font-weight: bold;">Don't list "Undecided"<sup>2</sup></span>
TU Student	Self			Not Applicable	Towson University
Father/Mother /Stepparent				Not Applicable	See <a href="#">Parent in College</a> form.
Student's Spouse				<input type="checkbox"/> Yes <sup>1</sup> <input type="checkbox"/> No	
All other siblings, children or dependents who meet the criteria defined above in Section A or B.				<input type="checkbox"/> Yes <sup>1</sup> <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <sup>1</sup> <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <sup>1</sup> <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <sup>1</sup> <input type="checkbox"/> No	

<sup>1</sup> Only check "Yes" for college if they will be seeking a degree or certificate and attending at least half-time between **7/1/2022 and 6/30/2023**.

<sup>2</sup> 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

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

- Parent or spouse of student died after filing 2022-23 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 2022-23 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 **2020** (i.e., severance, 401k distribution, pension distribution, etc)
  - Source of income: \_\_\_\_\_
  - Attach** supporting documentation of lost income source
- Untaxed income received in **2020** 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, 2021**.
  - 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 2020 (i.e. job loss, change in employers, reduction in pay/hours, etc)
- Parent/spouse/student reported unusually high **medical expense deductions** on their 2020 or 2021 federal tax return.
  - Which year were they highest?    \_\_\_2020    \_\_\_2021
  - Submit a signed copy of your 2020 or 2021 Federal Tax Return 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)

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- 1) **Your total annual household income be lowest for 2021 or 2022 (check one)?** \_\_\_ 2021 \_\_\_ 2022
- 2) Provide this required 2021 documentation.

**2021 Documentation for Dependent Students**

- Parents signed 2021 Federal Tax Return  
 Parents **2021 W2 forms for each employer**

**2021 Documentation for Independent Students**

- Student (and spouse, if married) signed 2021 Federal Tax Return  
 Student (and spouse, if married) 2021 **W2 forms for each employer**

- 3) Provide this required **2022** documentation (if applicable):

- 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 2022 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 2022 taxes have been filed.

- 4) You must also review your online **To-Do-List** and must submit all requested documents.

If we are requesting any Verification forms and/or and 2020 financial data, you must submit all those requested documents.

- From [Towson Online Services](#). choose **Self Service** → **Student Center** → **To Do List**.

**Note:** Your Online Services To-Do List is a personalized list that is different from the Enrolled Student To-Do lists.

- 5) **If you submit this form after 1/1/2023**, you must also submit:

- a signed copy of your **2022** Federal Tax Return  
 and copies of your **2022** W2 and/or 1099 forms from all your 2022 employers

## Part IV- Estimated 2022 Income

If your total 2022 income will be lower than your 2021 income, you must complete this section.

- Complete both tables. Report all your income before exemptions, adjustments, and deductions.
- Include all income/benefits that you or your parents/spouse expect to receive from 1/1/2022 through 12/31/2022.
- Complete all items. If an item doesn't apply, you must enter "0".

2022 Estimated Gross Taxable Income	Dependent Students Only:	Father	Mother
	Independent Students Only:	Student	Spouse
1. Wages, salaries, tips (include severance pay)		\$	\$
2. Pensions and annuities		\$	\$
3. Interest and dividends and capital gains		\$	\$
4. Business or farm income		\$	\$
5. Social Security benefits (taxable)		\$	\$
6. Income received from rents after expenses (mortgage interest, taxes, and insurance)		\$	\$
7. Alimony		\$	\$
8. Unemployment compensation		\$	\$
9. Any other taxed income		\$	\$
<b>Total 2022 Estimated Taxed Income (1 - 9)</b>		\$	\$

2022 Estimated Untaxed Income	Dependent Students Only:	Father	Mother
	Independent Students Only:	Student	Spouse
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 12a through 12d, codes D, E, F, G, H and S.		\$	\$
2. Deductible IRA and/or Keogh, SEP, and SIMPLE payments.		\$	\$
3. Child Support received for all children.		\$	\$
4. Tax exempt interest income.		\$	\$
5. Untaxed portions of IRA distributions.		\$	\$
6. Untaxed portions of pensions.		\$	\$
7. Living and housing allowances for clergy, military, and others. <ul style="list-style-type: none"> <li>• Include cash payments or cash value of benefits.</li> <li>• Exclude rent subsidies for low-income housing.</li> <li>• Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2021. Do not report any military housing benefits (BAH, BAQ, or the value of on-base military housing).</li> </ul>		\$	\$
8. Veteran's Non-educational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and /or VA Educational Work-Study allowances.		\$	\$
9. Any other untaxed income and benefits such as Workers Compensation, disability, etc.		\$	\$
10. Cash support or money paid on behalf of the student or the family.		\$	\$
11. Cash or any money paid on your behalf, not reported elsewhere on this form.			
List Type:		\$	\$
List Type:		\$	\$
List Type:		\$	\$
<b>Total 2022 Estimated Untaxed Income (1-12)</b>		\$	\$

**Part V - EXPLANATION AND CERTIFICATION**

1) Please explain your special circumstances and provide specific details about the changes in your financial situation since 2020. Include a timeline of any income changes and relevant employer names. **Please type or print legibly.**

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2) CERTIFICATION

- Because many situations require your final 2021 income data, you must wait until 1/1/2022 to submit this form.
- 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 \_\_\_\_\_

Parent Name (please print) \_\_\_\_\_ Parent Phone #: \_\_\_\_\_

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

**Submission Methods** (Choose one.) - Please include student's name and TU ID Number.

Document Upload	Fax	Mail	In Person
Scan documents and upload to <a href="http://www.towson.edu/SubmitAidDocs">www.towson.edu/SubmitAidDocs</a> . Please combine multiple pages into a single PDF file.	410-704-2584	Towson University Financial Aid Office 8000 York Road Towson, MD 21252	Room 339 Enrollment Services Center Monday - Friday 8:00 - 4:30

Please allow us 2 to 3 days to remove document requests from your To-Dos.