

Student Name \_\_\_\_\_

Wellesley ID number \_\_\_\_\_

**Section 1: Guidelines**

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You may request reconsideration of the financial aid offer due to a significant change in your financial circumstances or if you have special financial circumstances that were not reported on your initial financial aid application. Please complete all sections of this form as completely as possible. Please provide a personal statement to supplement the documentation requested below. You may be contacted for additional information or documentation.

Our Financial Aid Review Committee reviews requests for review in the order that we receive them. Response time will vary based on volume of requests and time of year. Generally, students can expect a response within 7-10 business days. The Financial Aid Review Committee will review and respond to you in writing. COVID-19 related appeals will be reviewed for changes in your spring eligibility.

**Section 2: Who has had a Change in Circumstances?**

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- Custodial Parent                       Noncustodial Parent                       Student

**Section 3: Change in Circumstance (check all that apply)**

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- Termination or Change of employment
- Date of Termination
  - Complete 2019 tax returns, including schedules and W-2 statements
  - Documentation of severance, unemployment benefits and final pay stub for each parent
  - Complete worksheet on next page
- One-time income (i.e.: back pay, capital gain, retirement withdrawal)
- Submit a complete copy of 2019 federal tax return
- Loss of Untaxed income (child support, social security, unemployment benefits, etc)
- Date of Termination
  - Any documentation related to the termination
- Unusual medical/dental bills
- Detailed explanation of expenses and itemized documentation of out of pocket medical expenses
- Expenses associated with care of an elderly grandparent
- Detailed explanation of expenses.
- Repayment of parent educational loans
- Attach recent statement from parent's loan provider, including loan type, servicer and monthly payment
- Other circumstances (explain in personal statement)

**Section 4: Personal Statement**

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You must include a personal statement explaining the reason for this request for reconsideration of aid. Provide as much detail as possible to help us better understand your situation. Please attach your statement to this appeal before uploading to IDOC.

## Section 5: Projected Income

Complete this section if there has been a reduction in your family's 2020 income. Please itemize all sources of income (both taxed and untaxed). Use pre-tax income. Please answer all questions; if zero, enter \$0.

	Actual 2020 Income (Jan 1 – Present)	Estimated 2020 Income (Present – Dec 31)	Total 2020 Income
Wages – Parent Name _____			
Wages – Parent Name _____			
Wages – Student _____			
Wages – Student Spouse _____			
Bonus Income (annual, quarterly or other bonus income)			
Interest and Dividend Income			
Capital Gain Income			
Business Income			
Severance Pay			
Pension benefits			
Taxable Retirement Distributions			
Untaxed Retirement Distributions			
Unemployment Benefits			
Workers' Comp and Disability (including SSDI) benefits			
Total Social Security (SS, SSI)			
Child Support (for all children in the household)			
Alimony Received			
Public Assistance (SNAP, TANF)			
Pre-Tax Retirement Contributions			
Health Savings Accounts Contributions			
Other Income (please explain in statement)			

## Section 6: Certification

By signing this worksheet, we certify that all information reported is complete and correct. We understand that purposely providing false information on this worksheet may result in fines, imprisonment, or both. In addition, all institutional aid eligibility will be forfeited. Failure to complete this form in its entirety may cause processing delays.

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

Date: \_\_\_\_\_

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

Date: \_\_\_\_\_

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