



### 2008-2009 Parent Contribution Adjustment Request

Complete this form if you feel your family has special circumstances that should be considered with your application for financial aid. Attach a letter of explanation and appropriate documentation (see back) for the circumstance(s) you wish to have considered. All sections below must be completed and the form must be signed in order for the request to be reviewed. **If you have a special circumstance that you feel warrants a review but that is not listed below, please speak with a counselor in the Office of Financial Aid for additional instructions.**

Student's Last Name, First, M.I. \_\_\_\_\_ Lander ID Number \_\_\_\_\_

Parent Name \_\_\_\_\_ Parent Daytime Phone \_\_\_\_\_

**Circumstances and documentation:**

Your request for an adjustment **must be accompanied** by the following:

- A letter of explanation explaining clearly the circumstance(s) surrounding the request; **AND**
- 2008-2009 Verification Form (if not already submitted); **AND**
- Parents' Signed 2007 Federal Tax Returns and W-2s; **AND**
- Student's Signed 2007 Federal Tax Returns and W-2s; **AND**
- Appropriate documentation from the chart below:

Circle one	Circumstance	Documentation Needed
<b>1</b>	Parents have become separated or divorced since applying for aid.	<ul style="list-style-type: none"> <li>▪ Copy of divorce or legal separation agreement or notarized letter confirming parents are separated</li> </ul>
<b>2</b>	Parent, whose income was included on the application, has died.	<ul style="list-style-type: none"> <li>▪ Copy of death certificate</li> </ul>
<b>3</b>	Parent, whose income was included on the application, has experienced a <b>loss of employment</b> resulting in a significant decrease in income for the 2008 tax year compared to the 2007 tax year (January 1-December 31).  Date Change Occurred: _____	<ul style="list-style-type: none"> <li>▪ Letter from employer documenting last day of employment</li> <li>▪ Copy of last pay stub</li> <li>▪ Documentation of severance pay, vacation pay, unemployment, retirement or disability benefits to be received for 2008, if applicable</li> <li>▪ Projected 2008 Income Statement</li> </ul>
<b>4</b>	Parent, whose income was included on the application, has experienced a <b>change in employment</b> resulting in a significant decrease in income for the 2008 tax year compared to the 2007 tax year (Jan. 1-Dec. 31).  Date Change Occurred: _____	<ul style="list-style-type: none"> <li>▪ Letter from employer documenting change in employment</li> <li>▪ Copy of last pay stub from prior job</li> <li>▪ Copy of last 3 pay stubs from new job</li> <li>▪ Projected 2008 Income Statement</li> </ul>
<b>5</b>	Parent received unemployment compensation or some type of untaxed income or benefit (i.e., Social Security, child support) in the last calendar year but has completely lost this income or benefit. The untaxed income or benefit must be from a public or private agency, a company, or because of a court order.	<ul style="list-style-type: none"> <li>▪ Letter from the benefit agency documenting that benefit has ceased.</li> </ul>
<b>6</b>	Parent received a one-time lump sum distribution.	<ul style="list-style-type: none"> <li>▪ Documentation of type, source, and date of lump-sum distribution.</li> </ul>
<b>7</b>	The family has paid unusual medical or dental expenses, not covered by insurance.	<ul style="list-style-type: none"> <li>▪ Medical bills or account statements showing medical expenses paid (<b>OR</b> 2007 Schedule A showing medical expenses). Expenses covered by insurance will not be considered.</li> </ul>
<b>8</b>	Parents' taxable income increased due to a fund transfer from a regular IRA account to a Roth IRA account.	<ul style="list-style-type: none"> <li>▪ Documentation that funds were transferred from a regular IRA to a Roth IRA.</li> </ul>
<b>9</b>	Parent(s) paid elementary and/or secondary school tuition for dependents.	<ul style="list-style-type: none"> <li>▪ Letter or bill from school documenting amount of tuition paid for 2007.</li> </ul>

# Projected 2008 Income Statement

1. Identify the reason (from front of this sheet) that a review is requested: \_\_\_\_\_

2. Identify any taxable income the parent(s) expect to receive 01-01-08 through 12-31-08:

- A. Wages, Salaries, Tips: Father \$ \_\_\_\_\_ Mother \$ \_\_\_\_\_  
 (Refer to worksheet below)
- B. Taxable portion: Pensions and/or Annuities: \$ \_\_\_\_\_
- C. Interest/Dividend Income: \$ \_\_\_\_\_
- D. Rental Income, Alimony, or Other Income \$ \_\_\_\_\_

3. Identify any untaxed income the parents(s) expect to receive 01-01-08 through 12-31-08:

- A. Social Security Benefits or VA Non-Educational Benefits \$ \_\_\_\_\_
- B. Unemployment or Welfare/AFDC Benefits \$ \_\_\_\_\_
- C. Child Support \$ \_\_\_\_\_
- D. Untaxed portion: Pensions and/or Annuities: \$ \_\_\_\_\_
- E. Military or Clergy Housing/Food Allowance \$ \_\_\_\_\_
- F. Any Other Untaxed Income: \$ \_\_\_\_\_

*I declare that the information reported on this document is true and accurate, and I understand that the Office of Financial Aid reserves the right to deny a possible adjustment when sound documentation is not provided. I understand that Lander University may verify all estimates of income at year end. Adjustments may be made to current or future financial aid if inaccurate estimates of income result in a financial aid overaward.*

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

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

Worksheet for Estimating 2008 Wages, Salaries, Tips for the Parent Experiencing Loss of or Change in Employment		
<b>1. What are the year-to-date earnings on your final 2008 pay stub for former position? (Please attach copy of pay stub.) Last date of employment:</b> _____		
2. What is the amount you are receiving per month for your new position, if now employed? (Please include a copy of your last 2 pay stubs documenting your monthly salary.) Start date for new position, if applicable: _____		
3. Number of Months you will receive this income through 12/31/08.		
<b>4. Total anticipated earnings from new position (Item #2 multiplied by Item #3)</b>		
<b>5. Total Anticipated Income for 2008 (include in Box a. on Projected Year Income Statement)</b>		

DATA ENTRY		COUNSELOR REVIEW	
RRAAREQ	N=Pending Review	Review PCAR instructions for all required docs. If not collected, note why.	
Initials/date		FAO Counselor/Committee Decision (circle)	Approved Denied
Fwd to Counselor date		Verification Completed and RNAVRxx updated (Note on Verf Review Wksht adjustments and attach PCAR)	
		RNANAxX/Information Release tab – PJ Used = YES	
		Recalc Need and update ROAUSDF etc and trans #	
		RRAAREQ – 09PCAR + add CORRP for correction	
		RHACOMM	
		Add to Excel for PJs and mail merge appropriate ltr based on whether ISIR rec'd or paper FAFSA coded	
		CNSLR Initials and date	



# Lander University Office of Financial Aid

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09VERF (PCAR)

## 2008 – 2009 Verification Worksheet

Student's Last Name	First	Middle	Lander ID #
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Your application for federal student aid was selected for a review process called “verification.” In this process, federal law requires the school to collect financial documents to ensure the accuracy of the information reported on the student’s **Free Application for Federal Student Aid (FAFSA)**. After all documents are received, the information will be reviewed for accuracy and adjustments. Any conflicts or inconsistent information will be corrected and aid packages adjusted as necessary.

You must return this completed form as well as all required financial documents (signed federal income tax forms, W-2s, etc.) to the Financial Aid Office **within 15 days after receiving this notification** in order for financial assistance to be disbursed. **Awards made prior to completion of verification are estimates only and are subject to change.**

### Important Instructions for Completion of Verification – PLEASE READ AND FOLLOW

- Print the student’s name and Lander ID or Social Security number on the top of all supporting documents.
- Do not leave any item blank. If the answer is “0”, put “0.”** *Incomplete Worksheets will be returned for completion.*
- Submit a complete and signed copy of your 2007 federal tax returns and your parent’s or spouse’s signed 2007 returns. **A complete copy includes every page of the return: all schedules, attachments, and W-2s. Social Security Benefits statements (Form SSA 1099) must be included for each family member listed in Section B who received benefits for 2007.**
- You may mail or fax this information to us.

### Section A: Student Status

1. Were you born before January 1, 1985?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2. At the beginning of the 2008 – 2009 school year, will you be working on a master’s or doctorate program (such as MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3. Were you married as of the day you completed your 2008-2009 FAFSA? (Answer “Yes” if separated but not divorced.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4. Do you have children who receive more than half of their support from you July 1, 2008 through June 30, 2009?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5. Do you have dependants (other than your children or spouse) who live with you and who receive more than half of their support from you July 1, 2008 through June 30, 2009?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6. Are (a) both of your parents deceased, or (b) are you (or were you until age 18) a ward/dependent of the court?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
7. Are you currently serving on active duty in the US Armed Forces for purposes other than training? (Refer to p. 3 of the FAFSA for instructions.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8. Are you a veteran of the US Armed Forces? (Refer to p. 3 of the FAFSA for instructions or p.2 of FAFSA on the Web instructions)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If you, the student, answered “**NO**” to all of the above questions, you are considered a **dependent student** for federal financial aid purposes and must provide your parents’ information and tax forms as well as your own. (**Note: Grandparents, foster parents, and legal guardians are not considered parents for this form.**)

If you answered “**YES**” to any of the above questions, you are considered an **independent student** and only need to provide your information and tax returns (as well as your spouse’s, if married).

**Section B: Household Information**

**\*\* Important – This section MUST be complete. \*\***

**Instructions for whom to include in “Name of Household Members”:**

**Dependent Students:** If you are required to provide your parent’s information according to the instructions in Section A, you must include the following:

- Yourself and your parent(s) (include stepparent) **NOTE: To determine who is considered a parent for purposes of this form, refer to p. 3 of the FAFSA or p. 4 of the FAFSA on the Web instructions.**
- Your parent’s other children if (a) your parents will provide more than half of their support from 7-1-2008 through 6-30-2009 or (b) the children could answer “NO” to every question in Section A,
- Other people if they now live with your parents and your parents provide more than half of their support, and will continue to provide more than half of their support from 7-1-2008 through 6-30-2009.

**Independent Students:** If you are not required to provide your parent’s information according to the instructions in Section A, you must include the following:

- Yourself and your spouse if you have one,
- Your children, if you will provide more than half of their support from 7-1-2008 through 6-30-2009,
- Other people if they now live with you and you provide more than half of their support, and will continue to provide more than half of their support from 7-1-2008 through 6-30-2009.

Name of Household Members	Social Security Number	Relationship to Student	Age	If this individual received assistance from any of the following federal benefit programs at any time during 2007, please list the program in the space below.  SSI, Food Stamp Program, Free or Reduced School Lunch, TANF, WIC	Name of College if this family member will be enrolled for 2008-2009 at least half-time in a program that leads to a college degree or certificate. Do not list a college for your parent(s).
1.		SELF			LANDER UNIVERSITY
2.					
3.					
4.					
5.					

(If you need additional space, attach an additional page.)

**Section C: Tax Information**

All tax filers must submit a **SIGNED and LEGIBLE** copy of their 2007 federal income tax returns (1040, 1040A, or 1040EZ) including **all schedules and W-2 forms**. *Unsigned forms will be returned and your application will be put on hold.* **Please Note: US Electronic Filing Form 8453 is NOT acceptable.** If you need a copy of your 2007 tax forms, you may call 1-800-829-1040 to request a tax summary. If an accountant or tax preparer prepared the tax returns, you may get a copy from them. **You must sign this tax summary** before sending it to the Office of Financial Aid.

**PARENT’S TAX FILING STATUS (check only one box below)**

Check here if you filed and attach a copy of **signed 2007 federal tax returns, schedules, 1099s and W-2 forms.**

Check here if you will not file and are not required to file a tax return for 2007. Enter income earned from work here: father \_\_\_\_\_ mother \_\_\_\_\_

**(REGARDLESS of status, submit W-2 forms for 2007. If no W-2s were issued, note reason.)**

**STUDENT’S TAX FILING STATUS (check only one box below)**

Check here if you filed and attach a copy of **signed 2007 federal tax returns, schedules, 1099s and W-2 forms** for student (and spouse, if married).

Check here if you will not file and are not required to file a tax return for 2007. Enter 2007 income earned from work here: student \_\_\_\_\_ spouse if married \_\_\_\_\_

**(REGARDLESS of status, submit W-2 forms for 2007. If no W-2s were issued, note reason.)**

**Section D: Untaxed Income and Exclusion Information**

Please list all sources of earned taxed income and untaxed benefits that you (the student) and/or your parents received for 2007. List totals for the year, **not monthly amounts**. **IMPORTANT - Enter "0" when appropriate. DO NOT LEAVE ANY ITEM BLANK. If not applicable, enter "0". A value must be placed in every blank. Do NOT draw lines – a value MUST be placed in each blank.**

**Worksheet A**

Student/Spouse	Source of Untaxed Income	Parent(s)
	Earned income credit from IRS Form 1040—line 66a; 1040A—line 40a; 1040EZ—line 8a	
	Additional child tax credit from IRS Form 1040—line 68 or 1040A—line 41	
	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	
	Social Security benefits received, for all household members as reported in student's household size (or parents' household size) that were not taxed (such as SSI). Report benefits paid to parents in the parents' column, and benefits paid directly to student/spouse in the student/spouse column.	

**Worksheet B**

Student/Spouse	Source of Untaxed Income	Parent(s)
	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.	
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28 + 32 or 1040A-line 17	
	Child support you received for all children. Don't include foster care or adoption payments.	
	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b	
	Foreign income exclusion from IRS Form 2555-line 45 or 2555EZ-line 18	
	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	
	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	
	Credit for federal tax on special fuels from IRS Form 4136-line 17-nonfarmers only	
	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	
	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	
	Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI (FAFSA questions 35 & 79). <u>Don't</u> include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements.	
	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	

**Worksheet C**

Student/Spouse	Source of Untaxed Income	Parent(s)
	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31	
	Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household.	
	Taxable earnings from need-based employment programs, such as Federal Work-Study and need based employment portions of fellowships and assistantships.	
	Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	

**Section E: Signatures**

By signing this worksheet, I/We certify that all of the information reported is complete and accurate.

\_\_\_\_\_  
Student Date  
(Required)

\_\_\_\_\_  
Spouse Date  
(Of independent student - optional)

\_\_\_\_\_  
Parent Date  
(Required for dependent student)

DATA ENTRY	COUNSELOR REVIEW	
RRAAREQ	N=Pending Review	Complete Verf Review form
Initials/date		CNSLR Initials/date
Fwd to Counselor date		