CARTHAGE COLLEGE

APPEAL REQUEST FORM

Students experiencing a change in household income may complete this form to request that their aid package be reviewed. Carthage understands there are a number of reasons a student's financial situation can change without warning. While filing an appeal does not guarantee a change in Federal or Institutional aid, the appeal process helps to identify opportunities to financially assist students. Please review this form carefully before submitting your appeal.

- Appeals are reviewed for both Federal Financial Aid and Institutional Aid.
    - o In the case of Federal Aid, Carthage may be able to file a professional judgment with your FAFSA to better reflect your current financial situation. These adjustments may decrease your Expected Family Contribution (EFC). Students with a 0 EFC are already eligible for the maximum federal award; filing a professional judgement will not generate a change to your eligibility.
    - o In the case of Institutional Aid, your appeal will be reviewed by a committee. The committee will base their decision on your current financial situation, availability of institutional aid and weeks remaining in the academic year.

- Residential students should work with the Office of Residential Life to see if there are more affordable on-campus housing options available.

- Students must be using all available financial aid that has been offered. This includes Direct Stafford Loans: both Subsidized and/or Unsubsidized.

- Upon filing an appeal, if you have not already been selected for verification you will be required to provide verification documentation.

- The appeal committee may require additional information and/or documentation beyond the items listed below. A committee member will request additional information/documentation via your Carthage email. Your appeal decision will not be made until all documentation is received.

- Students will be contacted with appeal results via their Carthage email.

A. STUDENT INFORMATION

Student ID# _____ Student Name_____
                                        Last Name   First Name   M.I

_____   _____@_____
Student's Phone Number   Student's Email Address

B. REQUIRED DOCUMENTATION

- A typed, dated, and signed letter of explanation for the appeal. Please summarize your current circumstances and include any additional information related to these circumstances.

- A 2020 and 2021 Tax Return Transcript or Signed IRS 1040 and W-2's for BOTH the student and parent(s)

- A 2022-2023 Verification form

- See Section C for documentation related to your circumstance

C. REASON FOR APPEAL

☐ Unemployment:

- Relationship of family member to student: _____
- Signed letter from employer on company letterhead verifying separation from employment. The letter must include the date of hire and date of separation.
- If receiving unemployment benefits - a copy of the benefit statement.
- If separated from more than one employer, you must submit a letter of separation for each employer.
- Provide the expected/projected income above.

☐ Divorce/Separation:

- Copy of divorce decree or documentation indicating separate residences and itemization of tax return if filed taxes as married.

☐ Death of a Family Member:

- Relationship of family member to student: _____
- Copy of death certificate.

☐ Medical/Dental Expenses Paid:

- Explanation of Benefits (EOB) from your insurance company or Schedule A of your taxes.
- Proof of payment.

☐ Change in Income:

- Relationship of family member to student: _____
- Paystubs to reflect the change in income.
- Signed letter from employer on company letterhead verifying change in income. The letter must include the reason (i.e. change in hours or reduction in pay).

☐ Other:

- Attached documentation related to your specific circumstance: _____

D. CERTIFICATION AND SIGNATURE

I certify that all the information provided is true and correct. If I purposely give false or misleading information, I may be fined $10,000.00, sent to prison, or both. If we have reason to believe that the information on this form is inaccurate, we may require additional documentation.

_____   _____
Student Signature   Date

_____   _____
Parent Signature   Date