

SPECIAL CONDITION APPLICATION - DEPENDENT STUDENT

STEP 1:

Student's Name _____
Student's Permanent Mailing Address _____
Please Print Student's Name _____

STEP 2:

Please complete any of the following that apply. At least one of the conditions in A-E must apply or you are not eligible to complete this form.

A. Parent's 2018 income will be substantially different from 2016 income due to loss of a job(s). Indicate: which parent was affected, __ father or __ mother; dates of unemployment, from __/__/__ to __/__/__; and the reason for unemployment. Condition could have developed due to retirement. _____

B. A parent who earned money in 2016 was not able to earn money in his or her usual way. This must be the result of either a **disability** or a **natural disaster** that happened in 2017 or 2018. Indicate whose employment was affected: __ father or __ mother; dates of loss of income, from __/__/__ to __/__/__; and describe the disability or natural disaster:

PROVIDE DOCUMENTATION OF THE LOSS OF INCOME AND SEND A COPY OF A PARENT'S 2017 TAX RETURN.

C. A parent who received some untaxed income or benefit in 2016 has **COMPLETELY** lost that income or benefit in late 2017 or 2018. The untaxed income or benefit must be from a public or private agency, from a company, or from a person because of a court order. Provide documentation that will support the loss. (Don't include loss of veteran's educational benefits.) Untaxed income and benefits include:

- ___ Court-ordered child support
- ___ Untaxed retirement or disability benefits
- ___ Other; please describe _____

Indicate: whose benefit was lost, __ father or __ mother; dates of loss of income, from __/__/__ to __/__/__; and the reason for the loss: _____

*D. You have already applied for Federal student aid for 2018-19 and, since that time, your parents have gotten separated or divorced. Write in the date your parents got separated or divorced: _____ **Please provide supporting documentation.**

*E. You have already applied for federal student aid for 2018-19 and, since that time, a parent has died. Write in the date that your parent died: _____ **Please provide supporting documentation.**

***If your parents were divorced/separated at the time you submitted your original 2018-19 application, or if a parent had died prior to that time, this form is not relevant: Stop here and contact our office.**

*If you are completing this application because your parents have become separated or divorced, or because a parent has died after you originally applied for aid, only include information relevant to the parent that will provide your support. (i.e.: your supporting parent's expected income, the number of people that parent will support, that parent's share of assets, including expected life insurance benefits, etc.)

STEP 3:

What is your parent's current marital status?

___ single ___ married ___ divorced ___ separated ___ widowed

How old is the older of your parents? _____

(If you are completing this Special Condition Form due to Condition D or E, give the age of your supporting parent.)

STEP 4:

Who will be a part of your parent's household in the 2018-19 school year?

Number of family members in 2018-19: _____ (Write in the total number of people that your parent(s) will support between July 1, 2018 and June 30, 2019. Always include yourself. Also include your parent(s) and your parents' other dependent children if they will provide the majority of support. Include other people only if they live with your parent(s) and your parent(s) provide over 1/2 of their support and will continue to provide that support.)

Number of college students in 2018-19: _____ (Of the number above, write in the number of family members who will be in college at least 1/2 time in the 2018-19 school year. Include yourself: **DO NOT INCLUDE A PARENT.**)

STEP 5:

Please complete all questions below; even if the answer is \$0:

Parents will complete the following 2018 tax form: __1040A or EZ __1040 __Won't file

Expected 2018 Income

A. Mother's/stepmother's earnings from Jan. 1, 2018 through **today** - **Provide a current pay stub:**

Mother's/stepmother's expected earnings from **tomorrow - 12/31/18:** + _____

Total expected 2018 earned income for mother: = _____

B. Mother's/stepmother's expected 2018 unemployment income: _____

C. Father's/stepfather's earnings from Jan. 1, 2018 through **today** - **Provide a current pay stub:**

Father's/stepfather's expected earnings from **tomorrow -12/31/18:** + _____

Total expected 2018 earned income for father: = _____

D. Father's/stepfather's expected 2018 unemployment income: _____

E. Other expected taxable income for 2018. Include such things as severance pay, pension, SSI, interest and dividend income, rents, royalties, partnerships, capital gains, taxable social security benefits, total taxable IRA, pension or annuity distributions, alimony, business or farm income not reported above, etc.: _____

F. Total A-E: _____

This should not be substantially different from your parents' actual 2018 federal **adjusted gross income**, once their 2018 federal tax return is completed.

Expected 2018 U.S. Income Tax to be Paid: _____

Don't include self-employment, state/local or social security tax. Also, report parent's expected year-end tax responsibility, not what will be withheld from their paycheck.

Expected Untaxed Income/Benefits:

In figuring expected untaxed income and benefits for 2018, remember that for each kind of income or benefit below, parent must add together the amount actually received from 1/1/18 until today and the amount expected from tomorrow until 12/31/18.

Please report a value for all of the following, even if the response is \$0.

Voluntary payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), which includes payments to IRA/ KEOGH, 401K or 403B programs: _____

Child support **received** for all children: _____

Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits): _____

Money received, or paid on parents' behalf (e.g., bills paid) not reported elsewhere: _____

Veteran's noneducational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC). : _____

Any other untaxed income and benefits not reported elsewhere such as workers' compensation, untaxed portions of retirement benefits, disability, etc. _____

DON'T INCLUDE:

*Taxable income or any income reported elsewhere on the form

*Money from student financial aid

*Veteran's benefits for education (GI Bill, Dependents Educational Assistance Program, or VA Contributory benefits).

*Money paid into tax-sheltered or deferred annuities or rollover pensions

*Untaxed Combat pay

*Flexible spending arrangements (e.g., cafeteria plans)

*Untaxed Social Security benefits

*Welfare Benefits (including food stamps or housing subsidies)

Step 6:

Amount of child support **PAID OUT** in 2018 by parent(s) who is completing this form. (Not to be confused with amount to be **RECEIVED** in 2018 by parent(s) who is completing this form.) Please provide the full name and age of the child(ren) for whom support was paid and the amount and the person paid in 2018: _____

Is the above child(ren) included in the family size in Step 4 above? _____

A child can normally either count in the family size **OR** you may claim support paid, but NOT both

Amount of Education Tax Credits that your parent(s) expect to take in 2018: _____

Other exclusions from income (please describe below: _____

Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. _____

STEP 7:

YOUR PARENTS' ASSETS

Add up all the money your parents have today in cash, savings accounts, and checking accounts: _____

If your parents own other real estate or have investments: (If they don't, write in \$0. Don't include the value or debt of your home if it is the primary place of residence for the family.)

What are they worth today? _____

What is owed on them? _____

If your parents own a business: (If they don't, write \$0. Don't include the value of a small business that parents own that has fewer than 100 full time employees.)

What is their share worth today? _____

What is owed on their share? _____

If your parents own a farm: (If they don't, write in \$0)
What is their share worth today? _____

What is owed on their share? _____

If there is an amount reported for farm value, do your parents live on that farm, and will they claim on Schedule F of their 2018 tax return that they "materially participated in the farm's operation"? _____ Yes _____ No

STEP 8:

Please list any other circumstances you would like us to be aware of, or provide explanation of any information you have reported:

STEP 9:

Certification: All of the information on this form is true and complete to the best of my knowledge. If asked by an authorized official, I agree to give proof of the information that I have given on this form.

Signature of Father

Signature of Mother

Date Completed: _____

SPECIAL NOTE: You may be required to submit a copy of your actual 2018 federal tax return once it is completed, to verify the accuracy of the information reported on this form. It is therefore important that you make this information as accurate as possible. Any state, federal, or institutional aid awarded based on the information provided on this application may be revoked if actual figures differ significantly from those provided, or if you fail to submit the requested 2018 tax return.

Upon completion, mail this form to: Office of Financial Assistance
Buena Vista University
610 West 4th Street
Storm Lake, Iowa 50588

If you have questions, please call: 1-800-383-2821 ext.2164