

Section 2 – Required forms and documents

Student Name: _____

Student must provide ALL of the following signed documents (worksheets can be printed at www.ius.edu/financialaid/forms.)
Additional documents may also be required:

- 2007 Independent Student Verification Worksheet
- 2007 Untaxed Income/Income Exclusion (ABC) Worksheet (include copy of social security benefit statement or 1099 if applicable)
- Signed copies of student's 2007 tax return and W-2's
- Signed copies of spouse's 2007 tax return and W-2's (if student was married at the time 2008/2009 FAFSA was originally filed.)

Section 3 – Check and complete all that apply. Completing one or more of the following choices may allow us to adjust the student contribution as determined by the FAFSA. Adjustments do not guarantee that the student will become eligible for additional financial aid.

Student and/or spouse expects a significant involuntary decrease in income from 2007 to 2008. Please note that changes in employment must be involuntary and 10 weeks must have passed since the date of employment change before you apply for an income adjustment. Person(s) who lost income: student spouse

Documentation:

- Last pay stub of former job
- Documentation that the job change was involuntary and on what date it took effect
- Most recent pay stub of new job and documentation of start date, and/or
- Unemployment Benefit Statement and/or Disability Benefit Statement

Student and/or spouse involuntarily lost all or a portion of their Social Security benefits or other untaxed assistance or income reported on the FAFSA. Person(s) who lost benefits: student spouse

Documentation: Benefit statement, 1099 or letter detailing loss of benefits showing the name of the beneficiary, the date the benefit ended or changed, and the monthly amount received before and after the reduction or termination of benefits.

Family has incurred extraordinary medical costs during 2007.

Documentation: Proof of all medical and/or dental expenses paid during 2007, including insurance premiums.

If you filed a federal 1040 tax return and you itemized your tax deductions, the amount listed on your 1040 Schedule A form can be used and a copy of this form will be sufficient evidence. If you did not itemize, provide an estimate of your expenses below. A simulation will be run to determine if your expenses are high enough to make a difference in your aid and if so will notify you of the documentation we will require. **Estimated medical expenses:** _____

Family has incurred extraordinary non-reimbursed living expenses during 2007 due to a natural disaster. Please provide an itemized statement showing expenses incurred and payments made in 2007 as well as documentation of the circumstance.

Documentation:

- Insurance claim/denial
- Receipts for damage and repair costs as well as extra living expenses

Student has become separated, divorced or widowed since filing the FAFSA. *Note: If marital status was the only question in Section 2 of the FAFSA that the student answered "yes", the student will no longer be considered independent if they file this claim and must then provide parent(s) 2007 tax return and W-2's.*

Student became separated divorced widowed on: (date) _____

Please provide documentation of the date noted above and any alimony or child support agreement.

Complete the Untaxed Income worksheet (see Section 2 above) based only on the student. If any assets reported on the student's FAFSA application have been split as a result of a divorce settlement, please provide a copy of the asset split agreement and documentation of values as of the above date per the split agreement. Note the total expected child support payments for the year (for any child in the household) on the Untaxed Income/Income Exclusion Worksheet.