



## INDEPENDENT SPECIAL CONDITIONS

Academic Year 2023-2024

The Department of Education recognizes that special conditions may exist for families who have suffered major reductions in income for various reasons during 2021 or 2022. For those families, the 2021 tax return does not accurately reflect the current financial status. If your family's income has been significantly reduced, you should complete this form and return it to the Financial Aid Office for further consideration of your 2023-2024 eligibility for aid.

### Student's Information

_____	_____	_____	_____
Last Name	First Name	M.I.	Student's ID Number
_____			_____
Street Address (include apt. no.)			Date of Birth
_____	_____	_____	_____
City	State	Zip Code	Email Address
_____			_____
Home Phone Number (include area code)			Alternate or Cell Phone Number

*Please read carefully all instructions to complete this form. You must provide COPIES of all documentation requested. Incomplete request submittals will NOT be evaluated.*

### INDEPENDENT SPECIAL CONDITION(S)

- Student has retired, been unemployed for at least two full months, or will experience a change in employment status which will result in an income reduction. Attach verification, i.e.: Statement from employer indicating last date worked and last pay stub, or DD214. Effective date of new employment status: \_\_\_\_\_ Mth/Day/Yr.
- Spouse has retired, been unemployed for at least two full months, or will experience a change in employment status which will result in an income reduction. Attach verification, i.e.: Statement from employer indicating last date worked and last pay stub, or DD214. Effective date of new employment status: \_\_\_\_\_ Mth/Day/Yr.
- Untaxed income has ceased or been reduced. Attach verification. Date of change: \_\_\_\_\_ Mth/Day/Yr.
- Permanent and total disability of father or mother. Attach verification. Date of disability: \_\_\_\_\_ Mth/Day/Yr.
- Death of spouse, Attach a copy of death certificate. Date of Death: \_\_\_\_\_ Mth/Day/Yr.
- One-time lump sum payment received (i.e.: severance, inheritance, lottery, etc.)
- Other such as reduction of income, household change.

**Written Statement**

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Provide a written explanation detailing all reasons your family’s income has been reduced. Attach additional pages as necessary.

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**Projected 2023/2024 Income Worksheet**

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Complete the Projected 2023/2024 Income Worksheet. Provide a separate statement and documentation (copies of pay stubs, etc.) explaining how you arrived at these projections.

Projected 2023/2024 Income Worksheet				
	Student Income (gross wages)	Spouse Income (gross wages)	Unemployment Benefits	Untaxed Income
July	\$	\$	\$	\$
August	\$	\$	\$	\$
September	\$	\$	\$	\$
October	\$	\$	\$	\$
November	\$	\$	\$	\$
December	\$	\$	\$	\$
January	\$	\$	\$	\$
February	\$	\$	\$	\$
March	\$	\$	\$	\$
April	\$	\$	\$	\$
May	\$	\$	\$	\$
June	\$	\$	\$	\$
<b>Totals:</b>	\$	\$	\$	\$

**2023 Gross Taxed and Gross Untaxed Income**

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Using totals from your Projected 2023 Income Worksheet, complete gross taxed and gross untaxed income sections below with income your family expects to receive from July 1, 2023 until June 30, 2024 (prior to exemptions adjustments, or deductions). **If zero, enter zeros. Attach a statement explaining how your family’s living expenses are provided.**

<b>2023/2024 Gross Taxed Income</b>	<b>Student Income</b>	<b>Spouse Income</b>
Wages, salaries and/or tips for 2023	\$	\$
Severance pay for year 2023	\$	\$
Pensions and Annuities for year 2023	\$	\$
Interest and dividend income for year 2023	\$	\$
Business or Farm income for year 2023	\$	\$
Capital gains for year 2023	\$	\$
Income received from rents after expenses paid for mortgage interest, taxes, and insurance for 2023	\$	\$
Alimony which will be received for year 2023	\$	\$
Unemployment compensation for year 2023	\$	\$
Any other taxed income for year 2023	\$	\$
<b>Total 2023 gross taxed income:</b>	\$	\$

<b>2023/2024 Gross Untaxed Income</b>	<b>Student Income</b>	<b>Spouse Income</b>
Payments to Tax-deferred Pension & Savings Plans (paid directly or withheld from earnings). Include untaxed portion of 401k and 403 b plans for 2023	\$	\$
Social Security benefits (SSI or disability) received by student, children or spouse, if married, for 2023	\$	\$
Retirement or Disability Benefits for 2023	\$	\$
Worker's Compensation for 2023	\$	\$
Welfare benefits including TANF (excluding Food Stamps) for 2023	\$	\$
Untaxed portion of pensions for 2023	\$	\$
Living & Housing allowances (excluding rent subsidies for low income housing) for clergy, military and others (include CASH payments and cash value of benefits) for 2022. <b>Don't include</b> the value of on-base military housing or the value of basic military housing allowance.	\$	\$
Child Support or Maintenance payments which will be received for ALL children for the year 2023	\$	\$
Cash support or money given on student's behalf for 2023	\$	\$
Veteran's Benefits, except Student's Educational Benefits, for the year 2023	\$	\$
Railroad Retirement Benefits for the year 2023	\$	\$
Any other Untaxed Income and Benefits such as Black Lung Benefits, Refugee Assistance, etc., for year 2023	\$	\$
<b>Total 2023/2024 gross untaxed income:</b>	\$	\$

## **Tax Returns and W2's**

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You must attach signed copies of student and parent 2021 **AND** 2022 Federal Tax Return(s) **AND** 2021 or 2022 W2s.

## **Certification and Signatures**

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Incomplete Special Conditions Requests will be returned or denied. Please review the form and initial each item indicating you have provided all requested documentation.

- \_\_\_\_\_ 1) Step A, check your reason for submitting the application and attach verification as requested.
- \_\_\_\_\_ 2) Step B, write a detailed explanation why the application is being submitted.
- \_\_\_\_\_ 3) Step C, complete the Projected 2023 Income Worksheet leaving NO blanks and provide documentation.
- \_\_\_\_\_ 4) Step D, complete both gross taxed and gross untaxed income tables.
- \_\_\_\_\_ 5) Step E, attach signed copies of student and parent 2021 and 2022 tax return and all 2021 or 2022W2s.

By signing this form I certify that all the information reported is true. I understand that purposely submitting false or misleading information is a federal offense punishable by fines, jail sentence or both.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

Note: We may require additional documentation as we work through the information provided.

<p>Submit completed form to: Office of Financial Assistance Northwestern Oklahoma State University—Herod Hall 113 709 Oklahoma Blvd Alva, OK 73717 Phone (580) 327-8542 Fax (580) 327 8177</p>
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