LEE UNIVERSITY

Financial Aid Office
Change in Income - Appeal 2023-2024

Students and families who have experienced a significant decrease in household income (earned by you, your spouse, or your parents) from the reported 2021 income information provided on the FAFSA can submit an appeal for reconsideration of eligibility for aid. Please note: the appeal for reconsideration does not guarantee a change in eligibility will occur.

An appeal (along with the required documentation) should be submitted AFTER your 2023-2024 FAFSA has been completed.

Please indicate the applicable change in income:

- ❑ Unemployment
- ❑ Loss of supporting family member
- ❑ One time distribution of funds from pension plan, insurance settlement, etc.
- ❑ Unusual out-of-pocket medical payments
- ❑ Private elementary/secondary tuition expenses

Required documentation to prove change in income:

- A written statement outlining the circumstances regarding change in income.
- Tax information from 2021 (must include one of the following)
  - Copy of first two pages of 2021 tax return
  - Entire 2021 tax return transcript
  - Use of the **IRS Data Retrieval Tool** on FAFSA
- Supporting documentation to validate the change in income. Possible supporting documents could be:
  - Signed copy of 2022 Tax Return
  - Statement of termination (with dates) from prior employer
  - Documentation of unemployment benefits
  - Medical out-of-pocket expenses (1040 Schedule A)
  - Copy of legal documentation proving change in marital status
  - Statement from private school showing tuition costs for the 2022-2023 school year.

Personal Information:

Student Name: _____
First Middle Last

Student ID: _____ Phone Number: _____

Permanent Address: _____
Street City State Zip

E-mail Address: _____

Submission:

Please submit this form with all the attached required documentation via fax or email:

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