

Office of Student Financial Aid
Phone: 240-567-5100
Germantown Rockville Takoma Park/Silver Spring
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Professional Judgement Appeal

The information provided on the FAFSA is used to determine how much your family can contribute towards the cost of your attendance. Our office recognizes that each family's situation is unique and that extraordinary circumstances occasionally arise that require individual attention. Use this form to request a reevaluation of your family's financial situation.

Student's Name (print): _____ MC ID #: _____

Did you file a Professional Judgement Appeal with our office during the 2021/22 award year? No Yes

Appeal Guidelines: You must clearly demonstrate a change in the family's financial situation occurred either during the 2020 tax year or later. Our office will use the information provided to determine if your appeal could make an impact to your financial aid award. Please note: Submission of this worksheet does not guarantee a change in aid. If you have incorrectly reported information on your FAFSA application, this review could negatively impact your EFC resulting in a loss/reduction of your current financial aid. **Please review the information on your 2022-23 FAFSA application for accuracy before submitting an appeal.** If the student's FAFSA is selected for federal verification, that process must be completed before this appeal can be considered.

Instructions: Check the box next to the type of appeal you are submitting. Answer each of the questions for that particular appeal and submit the required documentation. If you are a dependent student, at least one of your parents must sign and date the required personal statement. Please write the student's MC ID # on each page of your appeal package.

Unemployment/Change in Employment after January 1, 2020

Name of Unemployed Person: _____ Date the person became unemployed: _____

Has this person returned to work? No Yes, date _____

Required documents:

- ✓ Personal statement, signed and dated, explaining the change in family income, including relevant dates
- ✓ Employment termination letter, including any severance package details, if any
- ✓ Photocopy of last paystub(s) from employer(s) with whom you are no longer employed including year-to-date earnings for person named above
- ✓ Unemployment benefits determination letter. If not qualified, you must explain this in your personal statement
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return
- ✓ Paystub(s) from any new employment for this person

Retirement or Permanent Disability

Name of Retired Person: _____ Date of Retirement/Last date worked: _____

Relationship to the student: _____

Monthly amount of pension income: _____ Date payments began: _____

Required documents:

- ✓ Personal statement, signed and dated, explaining the change in family income, including relevant dates
- ✓ Photocopy of last paystub including year-to-date earnings for person above
- ✓ Proof of monthly Social Security benefits
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return
- ✓ Proof of pension, disability, or retirement annuity income, if any

Divorce or Separation after the 2022/23 FAFSA was filed

Please contact us if your parents filed a joint tax return in 2020, and consequently included both parents' income on FAFSA but were divorced/separated at the time they completed the FAFSA.

Date of Divorce or Separation: _____

Monthly amount of child support: _____ Date payments began: _____

Monthly amount of alimony: _____ Date payments began: _____

How many people will your custodial parent continue to support by providing at least 50% or more of their expenses? _____

Required documents:

- ✓ Personal statement, signed and dated, explaining the change in family income, including relevant dates
- ✓ Photocopy of Divorce or Separation Agreement, court orders for child support and/or alimony
- ✓ Proof of separate residences (lease/mortgage statements, property tax bills, utility bills, and driver licenses)
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return

Death of Parent/Spouse

Name of Decedent: _____ Date of Death: _____

Relationship to the student: _____

Required documents:

- ✓ Personal statement, signed and dated, explaining the change in family income, including relevant dates
- ✓ Photocopy Death Certificate
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return

Student's Name (print): _____ MC ID #: _____

Termination of Benefits {Child Support, Alimony, Unemployment, other}

Type of Income that was Terminated: _____

Date Benefits ended: _____

Relationship to the student: _____

Owner of the benefits which were terminated: Parent Student Spouse

Required documents:

- ✓ Personal statement, signed and dated, explaining the change in family income, including relevant dates
- ✓ Benefit Termination Notice
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return

One-time income {Such as Debt Cancellation, Inheritance, lump sum payment of benefits/settlements, Roth IRA Conversion, Lottery or gambling etc}

Source/Type of one-time Income: _____

Required documents:

- ✓ Personal statement, signed and dated, explaining the source of one-time income, including relevant dates. our letter must address why this income is not available for the student's education expenses.
- ✓ Documentation of the income source; if Roth Conversion, include documentation of deposits
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return

Unusually High Medical/Dental Expenses not covered by insurance

When were the expenses incurred: 2020 2021 2022

Total Medical/Dental Expenses Paid: \$_____ Amount Insurance Reimbursed: \$_____

Out of pocket Medical/Dental Premiums \$_____ paid monthly for _____ months

Required documents:

- ✓ Personal statement, signed and dated, explaining the change in family income, including relevant dates
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return
- ✓ Schedule A from the appropriate tax year for the expenses incurred. If you did not itemize, submit receipts of all PAYMENTS made for medical, dental, prescriptions, vision, health premiums, etc.

Elementary/Secondary Tuition, Dependent Care, and Extended Family Support Expenses

- ✓ Personal statement, signed and dated, explaining the elementary/secondary school tuition, dependent care, and/or family support expenses, including relevant dates
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return
- ✓ Schedule A from the appropriate tax year for the expenses incurred. If you did not itemize, submit receipts of all PAYMENTS made for medical, dental, prescriptions, vision, health premiums, etc.

Parent of Dependent Student also attending college

- ✓ Personal statement, signed and dated, explaining the parent's enrollment status, dependent care, and/or family support expenses, including relevant dates
- ✓ 2020 Federal IRS Tax Return Transcript, and W-2's or 1099's for all taxpayers on the tax return
- ✓ Class Schedule from parent's educational institution reflecting half-time enrollment

Dependent Student, No Parent Data: (**Student will be eligible for UNSUBSIDIZED LOAN ONLY**)

- ✓ Personal statement, signed and dated, explaining the parent's refusal to complete the parental section of the student's FAFSA
- ✓ Signed and dated statement from one of the student's parents specifically stating the parent(s):
 - Have stopped providing financial support to the student (including the date when financial support stopped):
 - Will not provide financial support in the future; and refuses to complete the parental section of a FAFSA

Affirmation and Certification:

By signing this document, I certify that all information contained on this form and in my (our) personal statement is true and complete to the best of my knowledge. Providing inaccurate or false information may result in the denial, reduction, withdrawal and/or repayment of financial aid. I understand the decision of the Office of Financial Aid is final.

Please note that a request for a Professional Judgement consideration does not guarantee the receipt or new or additional financial aid. Approval will be based on the circumstance stated and the documentation provided to support your case. Students should be prepared to pay their bill if they choose to register for classes. Notification of the appeal decision will be sent to the student's Montgomery College email account.

Student's Signature: _____ Date: _____

Parent's Signature: _____ Date: _____