



## Student Financial & Registration Services

### Request for Professional Judgment of Special Circumstances 2017–2018

Name \_\_\_\_\_ Student ID # \_\_\_\_\_  
Address \_\_\_\_\_ Date of Birth \_\_\_\_\_  
City, State, Zip \_\_\_\_\_ Phone # \_\_\_\_\_

**\*You must have already filed the 2017–2018 FAFSA and received an agreement letter listing your financial aid awards.**

Students and/or parents who wish to have their 2015 and/ or 2016 Adjusted Gross Income reviewed must complete this form and provide all required documentation. The Student Financial & Registration Office will review each student's circumstance on a case-by-case basis, and does not guarantee that students who submit this request will be given an adjustment. Professional judgments do not carry over from year to year. Circumstances that do not qualify for a professional judgment according to the U.S. Department of Education regulation HEA Sec. 479A(a) and The Culinary Institute of America include:

1. Standard living expenses (e.g. Home mortgage, credit card bills, car payments and other consumer items)
2. Tithing expenses
3. Vacation expenses
4. Tuition paid for private elementary or secondary schools
5. Bankruptcy
6. Professional licensing exam fees

**Please review the following circumstances and check the section that applies to you. Submit this form together with the required documentation to the Student Financial & Registration Services Office, The Culinary Institute of America, 1946 Campus Drive, Hyde Park, NY 12538, scan and e-mail to [SFRS@culinary.edu](mailto:SFRS@culinary.edu) or fax to 845-905-4030.**

**\_\_\_ Medical or dental expenses incurred or will be incurred after January 1, 2016 but before December 31, 2016 not covered by insurance or employer.**

**Required documentation:**

- A signed statement from the student (or parent if student is dependent) describing the situation and reason expenses were/are not covered by insurance.
- Copies of all related bills, invoices and payment statements for expenses already incurred.
- Statement from Doctor giving date and estimated cost of expense not yet incurred.
- 2015 and 2016 Federal Tax Return Transcript for student and parent (if student is dependent) with supporting W2s (*tax transcripts can be requested at [www.irs.gov](http://www.irs.gov)*).
- 2017–2018 Signed Verification worksheet.

**\_\_\_ Taxable income due to a one time pay out appearing on the 2015 federal tax return (e.g. conversion of IRA funds to Roth IRA).** Note: One time is defined as this year only, not once a year. Is this the first time you have taken a payout from these accounts?

**Required documentation:**

- A signed statement from the student (or parent if student is dependent) describing the situation and reason for pay out.
- Copies of all related invoices and fund balances.
- 2015 Federal Tax Return Transcript for student and parent (if student is dependent) with supporting W2s (*tax transcripts can be requested at [www.irs.gov](http://www.irs.gov)*).
- 2017–2018 Signed Verification worksheet.

\_\_\_\_ **Significant decrease or loss of income due to changes in employment occurring after January 1, 2016 (choosing to leave a job due to circumstances unrelated to health or working environment may not qualify).**

**Required Documentation:**

- A signed statement from the student (or parent if student is dependent) describing the situation and reason for loss of employment.
- Statement from former employer stating last day of employment.
- Copy of unemployment compensation application or letter as to why you will not be applying for unemployment.
- Copies of letters from unemployment denying or approving your application, including amount of compensation and when benefit is to start and end.
- Letter from new employer stating date of hire and amount of compensation.
- 2015 and 2016 Federal Tax Return Transcript for student and parent (if student is dependent) with supporting W2s (*tax transcripts can be requested at [www.irs.gov](http://www.irs.gov)*).
- 2017–2018 Signed Verification worksheet.

\_\_\_\_ **Loss of income due to illness, disability or death occurring after January 1, 2016.**

**Required documentation:**

- A signed statement from the student (or parent if student is dependent) describing the situation and reason for loss of employment.
- Statement from former employer stating days of work missed or last day of employment.
- Copies of any applications sent to agencies requesting compensation benefits or letter as to why you will not be applying for benefits.
- Copies of letters from agencies denying or approving your application for benefits, including amount of compensation and when benefit is to start and end.
- 2015 and 2016 Federal Tax Return Transcript for student and parent (if student is dependent) with supporting W2s (*tax transcripts can be requested at [www.irs.gov](http://www.irs.gov)*).
- 2107–2108 Verification worksheet.

\_\_\_\_ **Loss of compensation benefits reported on the 2015 federal tax return or on FAFSA (e.g. social security, TANF and welfare).**

**Required documentation:**

- A signed statement from the student (or parent if student is dependent) describing the situation and reason for loss of benefits.
- Copies of letters from agency stating the loss of benefit, including amount of compensation and when benefit is to end.
- 2015 and 2016 Federal Tax Return Transcript for student and parent (if student is dependent) with supporting W2s (*tax transcripts can be requested at [www.irs.gov](http://www.irs.gov)*).
- 2017–2018 Signed Verification worksheet.

**By signing this form I certify that all information and documentation is correct and accurate. I also understand that the approval of a professional judgment is not guaranteed, is at the discretion of the Student Financial & Registration Services Office and is final.**

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**Student Signature**

**Date**

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**Parent/Spouse Signature**

**Date**

Note: We cannot accept electronic signatures