

This form must be submitted by March 1, 2027 for the 2026 – 2027 academic year.

Occasionally, special circumstances exist that may warrant reconsideration of financial aid eligibility. These special circumstances may be either changes that have occurred in your family circumstances since you filed the Free Application for Federal Student Aid (FAFSA) or family circumstances not accounted for on the FAFSA.

On the following pages we have listed the circumstances that most commonly qualify a student to file a Special Circumstances request. Select as many circumstances as fit your current situation. If your circumstance(s) does NOT fit into one of the options, you may still file the Special Circumstances Form. Please attach a letter explaining your situation as well as any supporting documentation.

To Qualify for a Special Circumstances Review, You Must:

- Write a letter explaining your particular situation
- Choose one or more of the situations outlined on the following pages
- Complete all pages of this form
- Provide all requested documentation

Missing Information may delay processing.

Please note: Filing this appeal does not guarantee additional financial aid. Some appeals may only result in the student receiving the maximum in subsidized loan eligibility and/or Pell grant eligibility. Please allow 3-4 weeks for processing. Additional documents may be requested.

Student Name

Student ID#

E-mail

Phone Number

☐ Loss or Reduction of Employment Income

☐ Student Date of layoff/termination/retirement: _____
☐ Spouse Date of layoff/termination/retirement: _____
Has the student started another job? ☐ No ☐ Yes If yes, give start date: _____
Has the spouse started another job? ☐ No ☐ Yes If yes, give start date: _____

Documentation Required:

- Documentation from employer verifying loss of employment, including effective date; and
- A copy of the last pay statement showing gross year-to-date income for **all** jobs worked for **both** student and/or spouse (*if more than one employer per student and/or spouse, please include start/end dates in written statement*); and
- Documentation of unemployment benefits from state agency, if applicable; and
- Documentation of severance pay received, or IRAs, stocks, bonds, pensions, etc. converted to cash, if applicable.
- **Note: Reduction or loss of employment income must be for at least ten (10) weeks or sufficient documentation of change and new employment.**

☐ Loss of Other Income

Documentation Required:

- Statement from organization (unemployment office, Friend of the Court, Social Security, etc.) indicating when the income/benefits ended; and
- Verification of income/benefit amount received in 2024 and 2025, if applicable

☐ Loss of Child Support

Name of Child: _____ Amount received in 2026: \$ _____ Date support ended: _____
Name of Child: _____ Amount received in 2026: \$ _____ Date support ended: _____

Documentation Required:

- A copy of legal separation/divorce papers specifying amount of child support
- Statement from the Friend of the Court documenting when the child support ended

☐ Receipt of One-Time Income

Consideration for the receipt of one-time income may only be reviewed once during a student's enrollment at MTI.

Documentation Required:

- Signed statement explaining the reason for the income (early pension withdrawal, sale of home, etc.)
- Documentation showing the source of the income (Form 1099-R, etc.)
- A signed copy of your 2024 Federal Tax Return and/or 1099 form; and
- Documentation showing how much of the one-time income is still available and how funds were spent.

☐ Separation or Divorce since 2024

Date of separation/divorce: _____

Documentation Required:

- A copy of legal separation/divorce papers; and
- Documentation of residence in separate households; and
- Documentation of spousal support and/or child support; and
- A copy of student's most recent pay statement; and
- Copies of 2024 W-2 forms or other documents to separate income if a joint tax return was filed in 2024.

☐ Death of a Spouse since 2024

Date of Death: _____

Documentation Required:

- A copy of the death certificate or obituary; and
- Description of survivor benefits that are to be received including amounts and payment terms; and
- Student's 2026 income documentation

☐ Excessive Medical or Dental Expenses paid by you in 2024, 2025, and/or 2026

Please select the year you wish to claim: ☐ 2024 ☐ 2025 ☐ 2026

Documentation Required:

- Submit a copy of Schedule A – Itemized Deductions from your federal tax return; or
- Submit copies of supporting documentation as proof of out-of-pocket payments.
- For insurance premiums withheld from earnings, a copy of a pay statement.

Additional Information:

- Do not include payments covered by insurance or other resources.
- Please note: We cannot take into consideration payments made by insurance, unpaid invoices, handwritten confirmations of payments, Explanation of Benefits statements, or account statements.

☐ Elementary/Secondary Private School Tuition paid by your family in 2026

Documentation Required:

- Submit a copy of your bill or a letter from the school documenting cost and any gift assistance received. The bill must be for the 2026-2027 academic year.

☐ Other Circumstances not addressed in the above categories

Documentation Required:

- Submit a statement that explains changes in your financial and/or family situation, with relevant supporting documentation.
- Contact the Financial Aid Office if you are unsure about what type of documentation to provide.

FAMILY SIZE STATEMENT	
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Family Size includes the following:

- You and your spouse (if applicable)
- Your dependent children if the following are true:
 - They live with you (or live apart because of college enrollment);
 - They receive more than half of their support from you; and
 - They will receive more than half of their support from you from July 1, 2026 to June 30, 2027.
- Other persons if the following are true:
 - They live with you;
 - They receive more than half of their support from you; and
 - They will receive more than half of their support from you from July 1, 2026 to June 30, 2027.

The provided criteria for “dependent children” and “other persons” align with the requirement that family size align with whom you could claim as a dependent on a U.S. tax return if you were to file a U.S. tax return at the time of completing the 2026-2027 FAFSA. As a result, you should not include any unborn children in the family size.

[illegible]

INCOME ESTIMATES and ASSET EVALUATION

Use this form to document special circumstances for your household incomes received to date and to provide your best faith estimate of all sources of income for 2026. Please enter zero to indicate you do not have any types of taxable or untaxed income to report.

All Sources of Income for 2026	Year-to-Date 1/1/2026 - Today	Estimated Today – 12/31/2026
Student Total Wages, Salaries, Tips	\$	\$
Spouse Total Wages, Salaries, Tips	\$	\$
*Other Taxable Income:	\$	\$
*Other Taxable Income:	\$	\$
**Other Untaxed Income:	\$	\$
**Other Untaxed Income:	\$	\$
Assets	Student	Spouse (if applicable)
As of today, what is your total current balance of cash, savings, and checking accounts?	\$	\$
Child support received <small>Include all child support paid to you in the last complete calendar year for all children in the family size.</small>	\$	\$
As of today, what is the net worth of your investments, including real estate? Don't include the home in which you live. Net worth means current value minus debt.	\$	\$
As of today, what is the net worth of your current business and/or investment farms? Don't include the value of the family's primary home, even if the residence is on the farm property or used to run the business.	\$	\$

*Examples of **taxable** income: Unemployment compensation, taxable portion of Social Security benefits, severance pay, interest income, dividends, capital gains, alimony, pensions, annuities, IRA's, rents, royalties, partnerships, estates, trusts, life insurance payment, early withdrawal from 401k

Examples of **untaxed income: Worker's compensation, veteran's death benefits, disability, living allowances (housing, food, pensions, annuities, etc.) for military/clergy/other

CERTIFICATION AND SIGNATURE

By signing this form, I certify that all of the above information is complete and correct. All attachments and supporting documents are true to the best of my knowledge. I further understand that purposely giving false or misleading information may result in a fine, jail time, or both.

Print Student's Name

Student's Signature (required)

Date

Spouse's Signature (if applicable)

Date

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Return to:
Marine Trades Institute
485 S. Meridian
Cedarville, MI 49719

You may upload this form through the Marine Trades Institute Student Portal:
www.glbbs.empower-xl.com

Important: Incomplete forms will not be accepted