Income Appeal Questionnaire
(To be completed by student and/or parent due to special circumstances: job loss, unemployment, reduced income)

_____   _____
Student Name   ID Number

I am requesting that you use parent/parent spouse or student/student spouse projected year income on the current FAFSA rather than base year income to determine eligibility for financial aid. My reasons for this request are detailed below:

_____

_____

_____

_____

Documentation to substantiate the projected year's income is attached. Examples of documents may include, but are not limited to, employment termination letters, unemployment notices, pay stubs, W-2 forms, tax returns.

_____

I agree that I will inform the financial aid office at Berkeley College immediately if the projected year income changes from what I have estimated here today.

_____   _____
Student Signature   Date

_____   _____
Parent's Signature   Date

FAA WORKSHEET FOR INCOME APPEAL
(To be completed by Financial Aid Administrator)
(Students/Parents do not complete this section)

When did parent/spouse or student/spouse lose their job? _____

When did unemployment begin? _____
(verify with unemployment notice)

When did parent/spouse or student/spouse begin new job? _____

Gross weekly earnings at new job? _____
(verify with most recent pay stubs)

Other income (i.e. Pension, Retirement, 401k distributions) that should be included in AGI:

_____

_____

Please account for entire year income below. If unemployment was received and no wages earned, please write "unemployment" in the explanation – it is not necessary to write in the amount. The "amount" column should be used only for calculating any wages earned in the projected year.

Month	Actual Date (Month/Year)	Amount	Source
Month 1			
Month 2			
Month 3			
Month 4			
Month 5			
Month 6			
Month 7			
Month 8			
Month 9			
Month 10			
Month 11			
Month 12			
Total			

_____   _____
FAA Signature   Date

PROFESSIONAL JUDGMENT – INCOME APPEAL DECISION
(To be completed by Financial Aid Office)
(Students/Parents do not complete this section)

Student Name _____   Student ID _____

[ ] I am using professional judgment to approve this request to use projected income rather than base year income for the purpose of determining eligibility for Title IV financial aid for the_____aid year. Data elements will be substituted as follows:

	Base Year	Projected
AGI	_____	_____
Taxes Paid (Tax Tables)	_____	_____
Exemptions	_____	_____
Wages student/parent	_____	_____
Wages student spouse/parent spouse	_____	_____
Cash/Saving/Checking	_____	_____
Net Value of Investment	_____	_____
Net Value Business	_____	_____
Untaxed Income (refer to FAFSA)	_____	_____

[ ] I am denying this request to use projected income rather than base year income for the purpose of determining eligibility for Title IV financial aid for the _____ aid year. The reason for my decision is noted below:

_____
_____
_____
_____

_____   _____
Financial Aid Associate   Date

_____   _____
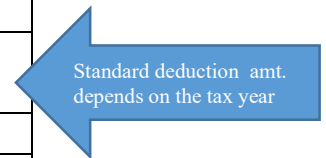Financial Aid Director   Date

INSTRUCTIONS
(For FA Office Use Only)
(Not for Student to complete)

AGI = Total income from W2(s) + Pension + Retirement + 401K Distributions

Taxes paid - calculate using Tax Tables; print the appropriate page from the tables, circling the correct amount.

In order to calculate taxes paid, you must have a reasonable idea how the tax-filer would file (HOH, single, etc.) and taxable income. How to calculate taxable income:

1	Projected AGI	
2	Standard deduction (*based on estimated filing status) OR prorated itemized deduction	
3	Line 1 minus Line 2	
4	Total from Line 3 = Taxable Income	

Standard deduction amt. depends on the tax year

Wages student/spouse or parent/spouse come from W2(s) and/or Pay Stubs

Cash/Saving/Checking – at the time of application - However, projected amount must be documented in order to be updated.

Net Value of Investment – at the time of the application – However, projected amount must be documented in order to be updated.

Net Value of Business – at the time of the application—However, projected amount must be documented in order to be updated.

*Do not include Making Work Pay credit and Education Credit

Untaxed Income – Have conversation with student/parent.
- Child support Received
- Work Comp
- Disability