



HOFSTRA
UNIVERSITY.

Dependent

2009-2010 Request for Re-evaluation

This form can be used to request a review of federal financial aid when there is a current significant reduction in family income or when there are present extenuating financial circumstances. Please note that you cannot submit this form unless you have a complete and valid 2009-2010 Free Application for Federal Student Aid (FAFSA) that is on file with Hofstra.

To help us determine if any adjustment can be made to your federal financial aid awards, please submit the following:

- 1) **Signed and completed 2009-2010 Request for Re- evaluation Form**
- 2) **Verification Documents:** (if filing after January 1st, 2010, 2009 tax returns are required)
 - A. SIGNED copies of the student's 2008 U.S. Federal Income Tax forms & all schedules
 - B. SIGNED copies of the parent(s) 2008 U.S. Federal Income Tax forms & all schedules
 - C. Copy of the student's 2008 W2 forms
 - D. Copy of the parent(s) 2008 W2 forms
 - E. Dependent 2009-2010 Verification Worksheet (attached)
- 3) Applicable **Required Documentation**, as outlined below, for the special circumstance that you report in Section I
 - A. ***Involuntary Loss of Employment***
 - i. Copy of termination notice *or* a statement from employer indicating last date of employment and the reason for the loss of employment (i.e. termination, layoff, disability, retirement, company closing or plant shutdown)
 - ii. Most recent pay stubs (including your last pay stub)
 - iii. Section II of this form
 - B. ***Loss of Other Income/Benefits***
 - i. Proof of your loss of income from appropriate agency
 - ii. Most recent pay stubs (including your last pay stub)
 - iii. Section II of this form
 - C. ***Separation/Divorce*** – Signed copy of the entire divorce/separation document
 - D. ***Death*** – Copy of death certificate
 - E. ***Excessive medical expenses paid*** – A detailed cover letter *and* either a) a copy of the federal tax return Schedule A *or* b) copies of the receipts showing the amounts you and/or your parents paid (please note that if you are filing due to medical expenses incurred with insurance, the receipts/documents need to clearly illustrate the amount paid by insurance and the amount paid out- of- pocket)

Return all applicable documentation to:

Office of Student Financial Services (Financial Aid), 126 Hofstra University, 202 Memorial Hall, Hempstead, NY, 11549-1260. If you are uncertain as to whether your situation can be considered for review or have questions about the review process, please contact us at (516) 463-8000.

Student Name: _____ Hofstra ID#:7 _____

SECTION I – Special Circumstance

Please check all that apply:

_____ **A. Loss of Employment**

A parent who earned money in 2008 has lost employment for at least 10 weeks in 2009, because of termination, layoff, disability, retirement, company closing or plant shutdown.

Name of unemployed parent: _____

Date unemployment began: ____/____/____

If applicable, date returned to work: ____/____/____

_____ **B. Loss of Other Income/Benefits**

A parent who received income in 2008 has completely lost that income for at least 10 weeks in 2009. The income must be from a public or private agency, or a company or a person ordered by the court to provide that income such as taxable Social Security benefits, untaxed court-ordered child support, untaxed retirement or disability benefits, or Temporary Assistance for Needy Families (TANF).

Name of parent who lost the benefit:

Type of benefit lost: _____

Date benefit last received: ____/____/____

_____ **C. Separation/Divorce**

Parents have separated or divorced AFTER the Free Application for Federal Student Aid (FAFSA) was filed. Separation or divorce must be prior to January 1, 2010. On the remainder of this form, report only the information of the parent with whom the student lives.

Date of separation/divorce: ____/____/____

Name of custodial parent: _____

_____ **D. Death**

A parent has died after the Free Application for Federal Student Aid (FAFSA) was filed.

Name of deceased: _____

Date of death: ____/____/____

_____ **E. Excessive medical expenses paid**

You or your parent(s) have incurred unusually high uninsured or unreimbursed medical, optical, and/or dental expenses (including insurance premiums) that are in excess of 11% of the total Adjusted Gross Income reported on the 2009-2010 FAFSA.

SECTION II — 2009 Estimated Income

This information is to be completed by the parent(s) of the student. If the custodial parent has remarried, the stepparent's income **must** also be included. List the names of all the places where you have worked during 2009 along with total earnings to date before taxes. Please report your total taxable and untaxed income beginning January 1, 2009, through today's date in Column B. Please list your estimated total taxable and untaxed income from tomorrow's date through December 31, 2009, in Column C. **Do not leave questions blank;** enter the appropriate numbers or "0" when no income is received.

	A	B	C	D
	Name of Employer/Company or Source of Income	Actual Income from 01/01/2009 to Today's Date / /	Estimated Income from Tomorrow through 12/31/2009	Total 2009 Income (column B+C)
Father's wages:		\$	\$	\$
Father's unemployment compensation:		\$	\$	\$
Mother's wages:		\$	\$	\$
Mother's unemployment compensation:		\$	\$	\$
Severance Pay:		\$	\$	\$
Other taxable income which may include interest or dividend income, alimony, business or farm income, pensions, annuities, taxable social security (include parent's benefits received by the parent for all children):		\$	\$	\$
Temporary Assistance for Needy Families (TANF):		\$	\$	\$
Child support <i>received</i> for all children:		\$	\$	\$
Other untaxed income and benefits (i.e. disability; workmen's compensation; payment to tax deferred pension and savings plans such as 401(K) or 403(B) plans; housing, food or other living allowances; maintenance income from a separated spouse; cash support given to parents and/or bills paid by others on their behalf):		\$	\$	\$



URGENT!

You have been selected for verification of the information reported on your FAFSA. Below, you will find a checklist to help avoid delays. Submit this information to the Office of Financial Aid immediately since federal aid is estimated until this process is complete. Failure to complete verification in a timely manner may lead to cancellation of aid. Upon review of the documentation you submit, additional information may be required; notification of such will be made as quickly as possible. You will be notified if FAFSA corrections result in changes/cancellation of award(s).

1. Submit the completed **2009/2010** Dependent Verification Form. Make sure the form is **signed by both the student AND parent**. This form is four-sided and needs to be filled out completely; if the answer is zero write "0", **do not leave blank**.
2. If the number in household and/or college you are reporting now on the Verification Worksheet does not match the number(s) you reported on the FAFSA, submit a written statement of explanation which must be **signed by both student AND parent**.
3. **Submit 2008 signed Federal Tax Return(s) if filed and W2 forms**. If you do not have a copy of your return, you may request a tax transcript by calling the IRS at 1-800-829-1040. (A wet signature is required by the tax filer on all tax returns, including electronically signed taxes, taxes prepared by others and tax transcripts).
4. Submit **Schedule E** of 2008 Federal Tax Return(s), if filed.
5. Return documents to:
Office of Financial Aid
202 Memorial Hall
126 Hofstra University
Hempstead, NY 11549-1260

Questions?

Call 516-463-8000 and a Financial Aid representative will be happy to assist you.



2009-2010 Verification Worksheet

Federal Student Aid Programs

Dependent

FORM APPROVED
OMB NO. 1845-0041

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with signed copies of your and your parent(s)' 2008 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

Complete this verification form and submit it to your financial aid administrator as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

What you should do

1. Collect your and your parent(s)' financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Complete and sign the worksheet—you and at least one parent.
4. Submit the completed worksheet, tax forms, and any other documents your school requests to your financial aid administrator.
5. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application. You or your school may need to make corrections electronically or by using your SAR.

A. Student Information

Last name	First name	M.I.	Hofstra Student ID Number
Address (include apt. no.)			Date of birth
City	State	ZIP Code	Home Phone number / Cell Phone Number (include area codes)

B. Family Information

List the people in your *parent(s)' household*, including:

- yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2009 through June 30, 2010, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- other people if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
<i>Missy Jones</i> (example)	<i>18</i>	<i>Sister</i>	<i>Central University</i>
		Self	Hofstra University

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0041. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: US Department of Education, Washington, DC 20202-5345.

C. Student's Tax Forms and Income Information (all applicants)

Dependent

1. Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of your tax return, request a copy from your tax preparer or request an Internal Revenue Service form that lists tax account information.
- Check here if you are attaching a signed copy of your tax return.
 - Check here if a signed tax return will be submitted to the school by _____ (date).
 - Check here if you will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 47 of the Free Application for Federal Student Aid (FAFSA).)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If you did not file and are not required to file a 2008 Federal income tax return, list below your employer(s) and any income received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

D. Parent(s)' Tax Forms and Income Information

1. Check only one box below. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If your parent(s) did not keep a copy of their tax return, request a copy from the tax preparer or request an Internal Revenue Service form that lists tax account information.
- Check here if you are attaching a signed copy of your parents' tax return(s).
 - Check here if a signed tax return(s) will be submitted to the school by _____ (date).
 - Check here if your parent(s) will not file and are not required to file a 2008 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See Question 95 of the FAFSA.)

Sources of Untaxed Income	2008 Amount	Sources of Untaxed Income	2008 Amount
a. Child Support	\$	d.	\$
b. Workman's Compensation	\$	e.	\$
c. Untaxed Pensions	\$	f.	\$

3. If your parent(s) did not file and are not required to file a 2008 Federal income tax return, list below your parent(s)' employer(s) and any income they received in 2008 (use the W-2 form or other earnings statements if available).

Sources	2008 Income
	\$
	\$
	\$

E. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Date

Parent Date

Do not mail this worksheet to the Department of Education. Submit this worksheet to your Financial Aid Administrator at your school. Don't forget to sign your tax forms.

Use the Tables Below to Report Annual Amounts

Report the total amounts received in 2008 **not** monthly amounts.

If the amount is zero, write "0", **do not leave blank.**

PARENT'S	2008 Additional Financial Information	STUDENT'S
\$	a. Education Credits (Hope and Lifetime Learning tax credits (from IRS Form 1040 – line 50 or 1040A – line 31).	\$
\$	b. Child support paid by the parent you live with because of divorce or separation or as a result of a legal requirement.	\$
\$	c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of Fellowships and assistantships.	\$
\$	d. Grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	\$

2008 Untaxed Income

\$	a. Payments to tax-deferred pension and savings plans (paid directly or Withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$
\$	b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 – line 28 + Line 32 or or 1040A – line 17.	\$
\$	c. Child support received for all children in your household. (Don't include foster care or adoption payments).	\$
\$	d. Tax exempt interest income from IRS Form 1040 - line 8b or 1040A - Line 8b.	\$
\$	e. Untaxed portions of IRA distributions from IRS Form 1040 – lines 15a minus 15b or 1040A – lines 11a minus 11b. Exclude rollovers.	\$
\$	f. Untaxed portions of pensions from IRS Form 1040 lines 16a minus 16b or 1040A lines 12a minus 12b. Exclude rollovers. If negative, enter "0".	\$
\$	g. Housing, food and other living allowances paid to members of the Military, clergy and others (including cash payments and cash value of benefits).	\$
\$	h. Veterans non-education benefits such as Disability Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	i. Other untaxed income not reported, such as workers' compensation, disability, etc. (Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits. Workforce Investment Act educational benefits, combat pay, (if you are a not a tax filer), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
\$	j. Money received, or paid on you behalf (e.g. bills), not reported elsewhere on this form.	\$

**Were you (your household) supported in 2008 by any form of income reported below?
(do not include income already reported somewhere else on this form)**

yes no

Untaxed student financial aid, welfare, any kind of Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are a not a tax filer), benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.