



Last Name: _____

UO ID: _____

2024-2025 Academic Year

Special Circumstance Request for Independent Student - 2023 Tax Information

Student Name: _____

UO ID: _____

Our office understands there may be circumstances in which the information provided on the FAFSA does not always accurately reflect a family's current financial situation. Please complete this form if you would like our office to review your special circumstance for consideration of additional financial aid eligibility. Also keep in mind that changes in aid eligibility generally only pertain to the federal student aid programs (such as the Pell Grant and Subsidized Direct Loan), not institutional or state aid programs. Not all changes result in additional aid eligibility.

Check one box for each of the 3 required sections listed below and attach required documentation. Please submit all documentation at one time as incomplete submissions will delay processing time.

- 1. Attach a statement to this form that addresses why your 2023 income more accurately reflects your current financial situation, instead of your 2022 income that was already reported on the FAFSA (loss of employment, separation or divorce, death of a spouse, one-time source of income, other special circumstances).
- 2. Attach a **signed copy** of your (and spouse, if applicable) 2023 IRS 1040 tax form, including Schedules A, C & 1-3 (if filed) if not yet filed, submit all documents together after filing your 2023 federal tax return with the IRS; or
 - Copy of your (and spouse, if applicable) 2023 W-2(s) if you worked in 2023 but will not file taxes; or
 - Check here if you (and spouse, if applicable) had no income, will not file, and were not required to file a 2023 IRS Income Tax Return.
- 3. Use the table below to report your other 2023 income (and spouse, if applicable).

2023 Additional Financial Information (1/1/2023 – 12/31/2023)		
	Student	Spouse
Taxable earnings from Federal Work-Study	S	S

By signing this worksheet, you certify that all the information reported is complete and correct to the best of your knowledge. We may request additional documentation.

Typed or auto-generated electronic signatures NOT accepted.

Student Signature

Date

Spouse Signature

Date

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

Office of Student Financial Aid and Scholarships

1278 University of Oregon, Eugene OR 97403-1278

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