

1537 University blvd. Morrilton, AR 72110

(501) 977-2055 1-800-264-1094 Fax: (501) 977-2123

www.uaccm.edu

# REQUEST FOR PROFESSIONAL JUDGEMENT

Name:			Student II	D No.:	
(Last Name)	(First Name)				
Date of Birth:		Phone No.:			
Mailing Address:					
	address, P.O. Box, Rural Route, Etc.)				
(City)	(State)		(Zip)	(County)	

### **INSTRUCTIONS**

Financial aid eligibility for the academic year is calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). The income and asset information that you submitted was evaluated by a formula called Federal Methodology as set by Congress. This formula assumes that 2022 income is a good predictor of the family's financial strength during the student's 2024-2025 enrollment. Based on this assumption, financial aid eligibility is determined using 2022 tax return information.

The Office of Financial Aid at UACCM recognizes that many families have changes in income or family situation that cannot be reflected in the 2022 tax return data. Therefore, it is possible for students to appeal their financial aid eligibility if they have unique financial circumstances. A Request for Professional Judgment may be filed if you have special circumstances, which you believe warrant a reevaluation of your financial aid.

#### CIRCUMSTANCES MAY INCLUDE, BUT ARE NOT LIMITED TO:

- Loss or change of employment or dislocated worker
- Divorce or separation of parents or spouse
- Death of parent(s) or spouse
- Unusual medical expenses (not covered by insurance)
- One-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments)
- Student's parents has retired
- Purchase of a computer
- Receipt of untaxed foreign income for which taxpayer received a foreign tax credit

### CIRCUMSTANCES THAT ARE NOT CONSIDERED AS SPECIAL INCLUDE, BUT ARE NOT LIMITED TO:

- Standard living expenses (e.g. utilities, credit card payments, children's allowances, etc.)
- Mortgage payments
- Car payments
- Credit card or other personal debts
- Vacation expenses
- All other discretionary expenses

All Requests for Professional Judgment require Tax Return Transcript for student and parent (if student is dependent) along with W-'s and/or 1099's used to complete the tax return. You may obtain a tax return transcript by going online to www.irs. gov and follow the prompts to request a Tax Return Transcript for 2022. Please allow 3 to 4 weeks processing time from the time all documentation has been submitted. All decisions made by the Office of Financial Aid concerning special circumstances are final. If you have questions, please contact us at 501-977-2055.

Check Reason	Documents That May Be Required
Loss or change in employment	<ul> <li>For Professional Judgments due to job loss, there is a 4 week waiting period from date of termination</li> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2s for student and parents (if dependent)</li> <li>Copy of DD214 if appeal is due to discharge from active military duty.</li> <li>Copy of 2023 income taxes or the following three documents:         <ul> <li>Letter from former employer(s) stating the last date of employment</li> <li>Copy of unemployment compensation letter or signed statement that you did not or will not receive unemployment benefits</li> <li>Copy of last paystub(s) from former employer(s) and current employer(s) if applicable.</li> </ul> </li> </ul>

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Check Reason	Documents That May Be Required
2. Divorce or separation of parents or spouse	<ul> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2's for student and parents (if dependent)</li> <li>Copy of legal separation documentation, proof of separate, households, or divorce decree</li> </ul>
3. Death of parent(s) or spouse	<ul> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2's for student and parents (if dependent)</li> <li>Copy of death certificate(s)</li> </ul>
4. Unusual medical expenses	<ul> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2's for student and parents (if dependent)</li> <li>If you didn't itemize, please submit proof of payment</li> </ul>
5. One-time taxable income (e.g. IRA, Pension distribution, back-year Social Security payments)	<ul> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2's for student and parents (if dependent)</li> <li>Documentation to identify the source of the income</li> <li>Proof of payment and an itemized statement showing how the funds were spent (e.g. cancelled checks, receipts, bank statements.)</li> </ul>
6. Student's parent has retired	<ul> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2's for student and parents (if dependent)</li> <li>Documentation of monthly income sources fr all retirement income, including social security</li> </ul>
7. Other	<ul> <li>2024-2025 Request for Professional Judgment form</li> <li>Detailed letter explaining your circumstances (signed and dated)</li> <li>Copy of 2022 Tax Return Transcript and W-2's for student and parents (if dependent)</li> <li>Document supporting change</li> </ul>

### STUDENT'S FAMILY INFORMATION:

#### DEPENDENT

Number of Family Members: List below the people in the <u>parent's family</u>. If more space is needed, provide a separate page with the student's name and ID number at the top. Family members include:

- The student
- The parents (including a stepparent if applicable) even if the student doesn't live with the parents. Exclude a parent who
  has died or is not living with the family because of separation or divorce. Include a parent who is on active duty in the U.S.
  Armed Forces apart from the family.
- The student's siblings if the following are true:
  - They live with the student's parents (or live apart because of college enrollment),
  - They receive more than half of their support from the student's parents, and
  - · They will continue to receive more than half their support from the student's parents during the award year.
- Other persons if they following are true
  - They live with the student's parents,
  - They receive more than half their support from the student's parents, and
  - They will continue to receive more than half their support from the student's parents during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on the U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2024-2024 FAFSA. As a result, the parent should not include any unborn children in the family size.

#### INDEPENDENT

Number of Family Members: list below the people in the <u>student's family</u>. If more space is needed, provide a separate page with the student's name and ID number at the top. Family members include:

- The student
- The student's spouse, if applicable.

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- The student's dependent children if the following are true:
  - They live with the student (or live apart because of college enrollment),
  - They receive more than half of their support from the student, and
  - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
  - They live with the student,
  - · They receive more than half of their support from the student, and
  - · They will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the student could claim as a dependent on the U.S. tax return if the student were to file a U.S. tax return at the time of completing the 2024-2025 FAFSA. As a result, the student should not include any unborn children in the family size.

### List the people in your family:

Full Name	Age	Relationship
		Self

### A. INCOME ASSESSMENT FORM

Please complete the table below to help us assess your actual income for 2024. Report all income you expect to receive through December 31, 2024, in the appropriate boxes. You must include documentation supporting all income.

#### PARENT(S)/GUARDIAN INCOME INFORMATION

Income for 2024 (January 1 to December 31)	Actual 01/01/2024 to Today	Estimated Today to 12/31/2024	Totals = Actual + Estimated
FATHER'S Income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
MOTHER'S expected income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other taxable income (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.)			
Source:	\$	\$	\$
Social Security benefits	\$	\$	\$
Child support received	\$	\$	\$
Other untaxed income (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc)			
Source:	\$	\$	\$
Total parental income for 2024	\$	\$	\$

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### STUDENT INCOME INFORMATION

Income for 2024 (January 1 to December 31)	Actual 01/01/2024 to Today	Estimated Today to 12/31/2024	Totals = Actual + Estimated
Student's income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Spouse's expected income earned from work (wages, salaries, tips, net farm, or business)	\$	\$	\$
Other taxable income (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.)			
Source:	\$	\$	\$
Social Security benefits	\$	\$	\$
Child support received	\$	\$	\$
Other untaxed income (earned income credits, welfare benefits, workers comp., payments to IRA/Keogh, etc)			
Source:	\$	\$	\$
Total Student Income for 2024	\$	\$	\$

### ASSET INFORMATION

Please list the current asset information (if any of the following are applicable): Net worth means the market value of the asset minus debt on the asset	Parent Assets (For Dependent Students Only)	Student (and Spouse if Married) Assets
Current amount of cash, savings, and checking	\$	\$
Current net worth or real estate/investments other than home (net worth minus debt owed)	\$	\$
Current net worth of farm or business (net worth minus debt owed)	\$	\$

### C. CERTIFICATION AND SIGNATURE

Each person signing this worksheet certifies that all of the information reported is complete and correct. **The student and one parent must sign and date.** 

Signature:  (Parent Signature For Dependent Students Only)	Date:	
Signature: (Student)	Date:	
Warning: If you purposely give false or misleading info	rmation on this worksheet, you may be fir	 1ed,