

## Dependency Appeal 2009-2010

Students classified as dependent may petition to be reclassified as independent based upon documented adverse family circumstances. The criteria used to determine a student's dependency status for federal financial aid purposes are established by the U.S. Department of Education. If you can answer yes to any one of the following questions, you will automatically be considered an independent student and will not need to file an appeal:

1. **Were you born before January 1, 1986?**
2. **At any time since you turned age 13, were both your parents deceased? Answer yes, for biological or adoptive parents, even if you are now adopted.**
3. **At any time since you turned age 13, were you in foster care? Answer yes even if you are no longer in foster care as of today.**
4. **At any time since you turned age 13, were you declared a dependent or ward of the court? Answer yes even if you are no longer a dependent or ward of the court as of today.**
5. **Are you or were you an emancipated minor as determined by the court in your state of legal residence? Answer no if you are still a minor and the court order is no longer in effect or the court's decision was not in effect at the time you became an adult.**
6. **Are you or were you in legal guardianship as determined by a court in your state of legal residence? Answer no if the court order is no longer in effect or was not in effect at the time you became an adult.**
7. **At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?**
8. **At any time on or after July 1, 2008, did the director of an emergency shelter or transitional housing program funded by the U. S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?**
9. **At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?**

If you do not meet one of the above conditions, but still feel there are circumstances that warrant being considered independent of your parents, you must complete this form and provide the appropriate supporting documentation required for your situation. The following are examples of some special circumstances that could be considered for an appeal and required documentation:

<b>Your parents are incarcerated</b>	<b>Documentation of incarceration</b>
<b>You have left home due to an abusive family environment</b>	<b>Court documentation or police report(s) and letter from a counselor or other professional source*.</b>
<b>You do not know where your parents are and are unable to contact them (and you have <u>not</u> been adopted)</b>	<b>Letter from high school guidance counselor and letter from one other professional source*.</b>
<b>Your supporting parent is deceased and you have no contact with your surviving parent.</b>	<b>Copy of death certificate and letter or document from one professional source*.</b>

\*The following are suggestions for acceptable professional sources: Minister, Doctor, Attorney, Counselor/Therapist, Teacher/Professor, Employer/Supervisor, University administrator, Caseworker. (Generally, letters from parents, friends, or roommates are not acceptable).

Any letter submitted as documentation should be on letterhead stationery, if appropriate, and should include the following:

- The length of time and the nature of the writer's relationship to you
- The reason why you cannot provide your parents' information on the FAFSA
- The writer's signature, address and telephone number

PLEASE NOTE: Upon receipt of your documentation, it may be necessary to request additional information to clarify or supplement information already submitted. You will be notified if additional information is needed.

Not all situations are considered a special circumstance. The following situations, on their own, would not be considered through appeal:

- Your parents do not want to provide their information on your FAFSA
- Your parents refuse to contribute to your college expenses
- Your parents do not claim you as a dependent on their income taxes
- You do not live with your parents

If you feel you are eligible to appeal your status after reviewing the above information, please complete the following in its entirety.



**Section C-Expenses**

The following accounts are paid by:

Me	My Parents	Other (explain)	Yearly Expenses	Amount
			Tuition & Fees	\$
			Books & Supplies	\$
			Rent/Room Fees	\$
			Food/Meal Plan	\$
			Health Insurance	\$
			Clothing	\$
			Car Payment	\$
			Car Insurance	\$
			Maintenance/Gas	\$

**Section D- Parent Information**

When did you last have contact with your parents? \_\_\_\_\_

When did you last live with your parents? \_\_\_\_\_

Have your parents provided you with support in the last 12 months (support may include cash, housing, food, gifts, car insurance, loans, college costs, etc.)?  YES  NO

Type of financial support	Amount
_____	_____
_____	_____
_____	_____

Please give the address of both parents if known:

**Mom**  
 Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Dad**  
 Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Section E-Verification**

Please submit the completed Independent Verification Worksheet (attached) with a signed copy of your 2008 Federal IRS tax return (Form 1040, 1040A, 1040EZ).

**Section F-Third Party Documentation**

Please submit both of the following:

1. A letter from a Professional Source\* (see chart on first page) on letterhead documenting the existence of your adverse family circumstances.
2. A letter from another person having comprehensive knowledge regarding the existence of the adverse condition.

**STATEMENT OF CERTIFICATION:**

I certify that the information provided to document my status is true and complete.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

You may mail or fax copies of the dependency appeal and supporting documentation to:

Bowling Green State University  
 Student Financial Aid  
 Attn: Pamela Fletcher  
 231 Administration Building  
 Bowling Green, Ohio 43403-0114

Phone: 419-372-2651  
 Fax: 419-372-0404  
[www.bgsu.edu/offices/sfa](http://www.bgsu.edu/offices/sfa)



BOWLING GREEN STATE UNIVERSITY

Student Financial Aid

# INDEPENDENT Verification Worksheet 2009-2010

Your application was selected for a review in a process called "Verification". In this process, Student Financial Aid will be comparing information from your application with signed copies of your (and your spouse's if you are married) 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, or anytime clarification of application information is sought. If there are differences between your application information and your financial documents, Student Financial Aid may need to make corrections electronically and will do so.

To avoid unnecessary processing delays complete this verification form and submit it to Student Financial Aid as soon as possible. If you have questions while completing this form please call our office at 419-372-2651, Monday – Friday from 8:00 am – 5:00 pm, where financial aid advisors are available to assist you.

### What you should do:

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Complete and sign this worksheet.
3. Submit this completed worksheet, tax forms, and any other documents your school requests to Student Financial Aid.
4. A financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your application and make corrections electronically if necessary.
5. If further documentation is required after reviewing the worksheet and tax documents, notification will be sent to your BGSU email.

Summer semester due date: July 10, 2009  
Fall semester due date: November 20, 2009  
Spring semester due date: April 9, 2010

## A. Student Information

_____	_____	_____	_____
Last name	First name	M.I.	BGSU ID Number
_____			_____
Address (include apt. no.)			Phone number (include area code)
_____	_____	_____	_____
City	State	Zip Code	BGSU e-mail address

## B. Family Information

List the people in *your household*, including:

- yourself, and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2009 through June 30, 2010, even if they do not live with you, and;
- other people if they now live with you, and you 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 spaces below. Also write in the name of the college for any household member 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 to BGSU Student	College Attending
<i>Kate Jones</i> (example)	16	<i>wife</i>	<i>City University</i>
		Self	

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

**Independent**

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 listing tax account information. All tax documents must be signed and dated by you.

- Check here if you are attaching a signed copy of your tax return.
- 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

Sources of Untaxed Income	2008 Amount	Other 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.)

Source	2008 Income
	\$
	\$
	\$

**D. Spouse's Tax Forms and Income Information (if student is married)**

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 spouse did not keep a copy of their tax return, a copy should be requested from your tax preparer, or request an Internal Revenue Service form listing tax account information. If you and your spouse filed separate returns, each return must be signed respectively.

- Check here if you are attaching a signed copy of your and your spouse's joint tax return(s).
- Check here and attach spouse's signed tax return if your spouse filed a separate return.
- Check here if your spouse will not file and is not required to file a 2008 U. S. Income Tax Return.

2. Funds received for child support and other untaxed income.

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

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

Sources	2008 Income
	\$
	\$
	\$

**E. Student's 2008 Additional Financial Information (Include amounts for your spouse if married.)****Independent**

Education credits (Hope and Lifetime Learning tax credits) from IRS form 1040 – line 50 or 1040A – line 31.	\$
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 96 on the FAFSA.	\$
Taxable earnings from need-based employment programs, such as Federal Work Study and need-based employment portions of fellowships and assistantships.	\$
Student 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.	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$

**Answer the following questions about you, and your spouse if married, by checking the appropriate box:**

- Do you, or your spouse if married, own or control more than 50 percent of a small business?  Yes  No  
Does the business have 100 or fewer full-time or full-time equivalent employees?  Yes  No

**F. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. If married, spouse's signature is optional.

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

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date

**Mail this worksheet to:**

Bowling Green State University, Student Financial Aid, 231 Administration Building, Bowling Green, Ohio 43403-0114

Faxed copies are accepted and may be faxed to 419-372-0404.

If you need assistance completing this form you may contact a financial aid advisor by calling 419-372-2651, M-F, 8:00 am – 5:00 pm.