

2018-2019 APPEAL TO BE AN INDEPENDENT STUDENT REQUEST FORM

WCU Instructions and cover page

(Filing this form does not guarantee that your request will be approved.)

IF YOU LEGITIMATELY MEET ANY ONE OF THE FOLLOWING CONDITIONS YOU ARE AUTOMATICALLY CONSIDERED TO BE AN INDEPENDENT STUDENT BY THE FEDERAL GOVERNMENT:

As of the date you complete and sign the 2018-2019 Free Application for Federal Student Aid (FAFSA)

- You were born **before** January 1, 1995.
- You are married.
- You are a graduate student working on a master's or doctoral degree.
- You are currently serving on ***non-training related*** active duty in the Armed Services.
- You are a veteran of the U.S. Armed Forces.
- You have children who receive **more than half** of their support from you.
- You have dependents other than your children or spouse **living with you & receiving more than 1/2** of their support from you.
- At any time since you turned 13 years old, **BOTH** of your parents (biological or adoptive) are deceased.
- At any time since you turned 13 years old, you were in Foster Care.
- At any time since you turned 13 years old, you were a Dependent/Ward of the Court.
- You are or were an emancipated minor at age 18 or prior as determined by your state's court.
- You are or were in a legal guardianship at age 18 or prior as determined by your state's court.
- At any time on or after 7/1/2017, your high school or school district homeless liaison determined that you were an unaccompanied homeless youth (age 24 or younger).
- At any time on or after 7/1/2017, the director of a HUD funded emergency shelter or transitional housing program determined that you were an unaccompanied homeless youth (age 24 or younger).
- At any time on or after 7/1/2017, the director of a runaway/homeless youth basic center transitional living program determined that you were either an unaccompanied homeless youth (age 24 or younger) or were self-supporting and at risk of being homeless.

If you meet any one of the *above* conditions do NOT complete this form!

Many students feel they are independent because they currently live away from their custodial parents or are self-sufficient or because their parents no longer claim them on their income taxes. Others feel they should be considered independent because their custodial parents refuse to provide information on the FAFSA, or provide copies of federal tax documents, or because their parents refuse to help with college expenses. **However, according to federal law, these reasons are NOT sufficient for a student to be considered independent.** The Financial Aid Office is required to obtain and consider parent information for students who are not independent according to federal statute.

Exceptions are made only when adequate documentation of extenuating family circumstances exists. Extenuating circumstances are generally defined by students' inability or inadvisability to have contact with their parents. **If none of these circumstances apply to your situation, do not complete this form, but instead make an appointment with an Assistant Director of Financial Aid to discuss options for completing the FAFSA.**

To file a request to apply for financial aid as an independent student:

- **Complete and sign the attached form.**
- **Attach your signed personal statement.**
- **Attach required documentation including any third-party documents.**
- **Complete and sign a WCU Independent Student Verification Worksheet.**
- **Attach your signed 2016 IRS tax return transcript & W-2 forms (or if you did not file, attach your W-2 forms or other documentation of your 2016 income).**
- **Attach Year to Date pay stubs for all jobs held currently in 2018.**
- **Attach documentation of any untaxed or in-kind (expenses covered by others) support.**
- **File your 2018-2019 FAFSA on-line at <https://fafsa.gov>.**

Incomplete and/or unsigned requests will be denied. The decision of the WCU financial aid office is final.

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Instructions for Third-Party Documentation

In extraordinary cases, while not required, the Financial Aid Office has the authority to use professional judgment to override a student's dependency status to make a student independent for the purpose of applying for financial aid.

Please note that students, who have chosen to live away from their custodial parents, but maintain a relationship with them are not eligible for a dependency override. Also, students whose custodial parents *refuse* to provide information on the FAFSA, provide federal tax forms, or *refuse* to help with college expenses. **However, according to federal law, none of these are acceptable reasons for a successful appeal.** A student must be **unable** to obtain his/her parents' information because of extenuating circumstances.

Students must submit the 'Appeal to be an Independent Student Request Form' and neutral third-party reference letter to the Financial Aid Office for consideration of a dependency override. The information stated on the form must be verified by third-party references that are aware of and can verify the student's background (see the form for the number of statements required). **Examples** include, but are not limited to: employer, clergy, social worker, attorney, court official, teacher, counselor, psychiatrist, psychologist, medical professional, or law enforcement agent.

Instructions to Neutral Third-Party Reference:

Third-party documentation must be on a separate sheet of letterhead paper. Please include any information of which you have *firsthand knowledge* and that you feel best describes the student's situation. The following is a list of information that **MUST** be included in your letter:

1. How long you have known the student.
2. Your professional relationship to the student.
3. The last time the student lived with and/or received financial support from his/her parents.
4. Any knowledge you have of the student's relationship with his/her parents (not hearsay).
5. Steps the student has taken to establish independence from his/her parents.
6. If the courts, or other appropriate parties have advised against the student having further contact with the parents.

Please make sure to include your professional title, name and type of business, business address, telephone number, and where to contact you should any additional information be required.

Please understand that by providing the information on the third-party letter you are certifying that it is true and correct and that to falsify any information on your letter is a felony and can be punishable by a \$20,000 fine, imprisonment, or both.

Attach a dated and signed, legible personal statement which completely and explicitly explains the basis of your request. Remember to include either your Social Security number or preferably your WCU ID. **The information will be held in strictest confidence.** Attach documentation which verifies **all** the facts of your request. Required sources of documentation are listed below according to the reason for your request.

Check off the reason listed below which comes closest to your situation. If you do not meet any of the reasons call the WCU Financial Aid Office:

- 1.** Severe circumstances prevent you from obtaining your custodial parents' financial information. Examples:
- a) A documented abusive home situation which is detrimental to your physical or mental well-being
 - b) Abandonment by both parents *prior to* your junior year in high school
 - c) A substantial history of severe parental alcohol or drug abuse
 - d) Incarceration of the custodial parent
 - e) Long term or permanent hospitalization of the custodial parent
- 2.** The death of a custodial parent after filing the FAFSA and the surviving parent meets one of the conditions listed above in number 1.

Required documentation for numbers 1 or 2 above: Signed statement from an adult professional who is **not** a family member which verifies the family circumstances described in your personal statement. Adult professionals include clergy, attorneys, school guidance counselors, medical doctors, mental health professionals, teachers or professors, law enforcement officers, professional staff of Children and Family Services (Public Assistance Department), and officers of the court. Letters must be signed originals on agency letterhead with the professional title (Counselor, Rabbi, etc.). **Personal references which do not represent an agency opinion must be notarized.**

- 3.** You are a non-citizen of the United States of America (who is otherwise eligible to receive Federal financial aid) and your custodial parents currently reside in a foreign country. However, you are unable to communicate with your parents because of a long-standing diplomatic policy OR civil unrest in your parents' country of residence.

Required documentation: Signed statements from the embassy or consulate of the country in which your custodial parents live which clearly states that policies of that country or of the United States of America *prevent* mail and funds to be readily transferred between residents of the United States and their country. If an official government statement is not readily available, a similar statement from a refugee organization on their letterhead is acceptable. In addition, a **notarized statement** from your sponsors (if applicable) or a family member verifying the level and type of support you receive from family, friends, or sponsors.

- 4.** Your prior status as married was the only reason you were considered independent on a previous FAFSA, but you are now divorced and are not remarried. You now maintain a separate residence from your parents/in-laws/spouse and pay all expenses from your own income and assets, and are not claimed by any of them on their tax forms.

Required documentation: Complete copies of your marriage license(s), divorce decree(s), IRS "Tax Return Transcript" and W-2 forms for the period in which you were married, and mortgage or rental agreements for the period in which you were married. A **signed and notarized** statement from both of your parents verifying amounts of financial support of any kind (other than reasonable gifts for birthdays and holidays) or the absence of such support after you married.

- 5.** You have extenuating circumstances not described above which prevent you from having contact with your parents to obtain parental information for FAFSA filing.

Required documentation: Signed statements from an adult professional who is **not** a family member which verifies that your extenuating circumstances prevent you from having contact with your parents. Adult professionals include clergy members, attorneys, school guidance counselors, medical doctors, mental health professionals, teachers or professors, law enforcement officers, professional staff of Children and Family Services (Public Assistance Department), and officers of the court. Letters must be signed originals on agency letterhead with the professional title (Counselor, Rabbi, etc.). Personal references which do not represent an agency opinion must be notarized.



Schock Financial Aid Office
 030 Kershner Student Services Center
 25 University Avenue
 West Chester, PA 19383
 P: (610) 436-2627 F: (610) 436-2574
 E: finaid@wcupa.edu
www.wcupa.edu/finaid

WCU ID# _____

Required

2018-2019 APPEAL TO BE AN INDEPENDENT STUDENT REQUEST FORM

| | |
|--|---|
| <p>Student Demographics</p> | <p>Name: _____ Social Security#: _____ DOB: _____ Address: _____ City, State, Zip: _____ Phone Number: (_____) _____ Email: _____</p> |
| <p>Student's Present Living Arrangements</p> | <p>With whom do you live? _____ What is their relationship to you? _____ Number of years & months at current address: ___yrs ___mos</p> |
| <p>Lawful Custodial Parent Information</p> | <p>Parent #1's Name: _____ Address: _____ City, State, Zip: _____ Parent #2's Name: _____ Address: _____ City, State, Zip: _____</p> |
| <p>Dependency History</p> | <p>What date did you last live with your parents? _____ When did your parents last provide you any support? _____ When did you last have contact with your parents? _____ How often do you have contact with your parents? _____ Did your parents claim you on their 2016 federal tax form? _____ Will your parents claim you on their 2017 federal tax form? _____ Did WCU grant you a request to be independent in a prior academic year? _____</p> |

Complete both sides & submit to the WCU Financial Aid Office along with all required documentation attached.



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Required

Student's 2018 Expense Information - The following expenses incurred in 2018 are paid by:

| Me | My Parents | Other | Expense Categories | Yearly Amount |
|--------------------------|--------------------------|--------------------------|-------------------------------------|---------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Tuition /Fees | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Rent/Mortgage/Housing | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Utilities (Gas, Electric, Water) | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Food | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transportation | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medical (Include Insurance Premium) | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Child Care | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Other: | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Other: | \$ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Other: | \$ |

Student's Current 2018 Income Information

| Type of Income | Source(s) | 2018 Year-to-Date Amount |
|----------------------|-----------|--------------------------|
| Wages | | \$ |
| Interest/Dividends | | \$ |
| Untaxed Income | | \$ |
| Cash/In-Kind Support | | \$ |
| Other | | \$ |

CERTIFICATION - Read carefully before you sign.

- I certify that the information provided on this form is true and correct.
- I fully understand that to falsify any information on this form in order to receive Federal Title IV funds is a **felony** and can be punishable by a \$20,000 fine, imprisonment, or both, as well as loss of future financial aid eligibility.
- I understand that if my situation changes in any way or if I move back to my parents' home or receive any kind of support from them, that I must report this information to the Financial Aid Office.
- I understand that by signing this form I authorize the Financial Aid Office to contact my third-party reference(s) to verify any information supplied on this form.
- I understand that I will need to reestablish my eligibility to be independent by reapplying for each academic year that I do not automatically meet the federal definition as independent.
- I understand that as a condition of this appeal I must also obtain and complete a WCU Independent Student Verification Worksheet and provide a copy of my 2015 IRS "Tax Return Transcript" and/or W2 statements.

 Student's Signature

 Today's Date

 WCU ID#

Check here if WCU has previously granted your request to be considered independent in a prior academic year.
 What academic year? _____

Note: Failure to follow all steps or submit all required documents will result in your request being denied.

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| For FA Office Use Only: Approved __ Denied __ Initials ____ Date _____ Student Notified __ NA updated __ CPS notified __ Cleared CPS Date _____ _____ _____ |
|---|