

**WINTHROP UNIVERSITY  
OFFICE OF FINANCIAL AID**

**Special Circumstances Request - Independent  
2026-2027**

Student's Name \_\_\_\_\_

Winthrop ID Number \_\_\_\_\_

**Please Note**

- Deadline to submit request: March 3, 2027
- Special consideration is limited to the circumstances listed below, as many factors are already reflected in the FAFSA.
- Potential aid changes are generally limited to Pell Grant eligibility and, if applicable, converting a portion of unsubsidized loans to subsidized loans (up to annual limits).

**Step One – Initial Paperwork**

1. A brief letter describing the special circumstances to be considered.
2. Submit the following Independent Verification forms:
  - a. 26/27 Verification - Independent ([www.winthrop.edu/finaid/forms-online.aspx](http://www.winthrop.edu/finaid/forms-online.aspx)).
  - b. 26/27 Tax Return Verification Student - Independent ([www.winthrop.edu/finaid/forms-online.aspx](http://www.winthrop.edu/finaid/forms-online.aspx)).
  - c. 26/27 Assets – Student ([www.winthrop.edu/finaid/forms-online.aspx](http://www.winthrop.edu/finaid/forms-online.aspx)).
3. SIGNED copy of your 2024 federal tax return (1040)

**Step Two – Reason for Request**

Check One	Reason for Appeal	Required Documents
<input type="checkbox"/>	<b>Reduction in income for at least 8 weeks (example: loss of employment)</b>  <input type="checkbox"/> Student <input type="checkbox"/> Spouse	<ol style="list-style-type: none"> <li>1. Letter from previous and/or current employer stating last date of employment and/or reason for unemployment/decrease in pay.</li> <li>2. Most recent pay stub showing year-to-date earnings.</li> <li>3. Proof of unemployment benefit amount or statement that you do not qualify for unemployment.</li> </ol>
<input type="checkbox"/>	<b>Divorce/Separation</b>  *Note – You (and/or your spouse) must be separated for at least eight weeks before submitting this form.	<ol style="list-style-type: none"> <li>1. A copy of the divorce decree or separation agreement <b>OR</b> a signed statement stating date of separation <b>and</b> proof of separate residences.</li> <li>2. 2024 W2's for each person.</li> <li>3. 26/27 Child Support Received – Independent (<a href="http://www.winthrop.edu/finaid/forms-online.aspx">www.winthrop.edu/finaid/forms-online.aspx</a>)</li> </ol>
<input type="checkbox"/>	<b>Medical/Dental</b> (paid medical bills)	<ol style="list-style-type: none"> <li>1. Total out-of-pocket <b>paid</b> medical/dental expenses not covered by insurance that are in excess of 11% of your adjusted gross income may be considered. If you meet these criteria, contact the Office of Financial Aid for a <i>Medical/Dental Adjustment Request Form</i>.</li> </ol>

### Step Three – Projected Income

<b>Sources of Income</b> (If item does not apply write in \$0)	<b>Actual</b> (Jan 1 – Today 2026)		<b>Estimated</b> (Today – Dec 31, 2026)		<b>2026 Total</b>
<b>Gross Wages/Tips/Severance</b> – Student		+		=	
<b>Gross Wages/Tips/Severance</b> – Spouse		+		=	
<b>Other Taxable Income</b> (Alimony, Social Security, Retirement, etc.) Type: _____		+		=	
<b>Taxable Pensions and Annuities</b>		+		=	
<b>Business Income/Loss</b>		+		=	
<b>Unemployment Benefits</b>		+		=	
<b>Other Untaxed Income</b> (Pensions/Annuities, Disability, etc.) Type: _____		+		=	
<b>Other:</b> _____		+		=	
<b>TOTAL 2026 Estimated Income</b>		+		=	

Processing time for the *Special Circumstances Request* takes approximately 4-5 weeks. Submission of the *Special Circumstances Request* in no way guarantees an adjustment to the student's financial aid and does not waive payment deadline dates. We recommend that the student complete all current aid requirements and accept any financial aid the student wishes to use to pay his/her bill.

*By signing below, I certify that the information provided on this form is true and correct to the best of my knowledge. I understand that if I do not submit any missing information within 30 days of the request, my Special Circumstances Request will be cancelled by the Office of Financial Aid. The Office of Financial Aid reserves the right to review all requests on a case by case basis and make adjustments if deemed appropriate. Finally, I understand that the financial aid administrator's decision is final and cannot be appealed to the U.S. Department of Education.*

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's E-mail