

2026-	2027 Special & U	Jnusua	l Circumstances Form		
Student Name:			_ Student ID #:		
If you or your family have/has experienced a make adjustments to your Student Aid Index (2027 Free Application for Federal Student Aid documentation.	(SAI). In order to	take the	special condition into con	sideration, you must file a 2026-	
Part I – Family Size Information					
Dependent Students – list the people in you Family Size:	ır		Independent Students – including:	list the people in your Family Size	
 Yourself Parent(s) (including step-parent) even if you don't live with them Your parent(s)' other children, even if they do not live with your parent(s), if your parent(s) will provide more than half of their support from July 1, 2025 through June 30, 2026 or if the children would be required to give parental information on the FAFSA Any other people if they will live with your parent(s) and will receive more than half of their financial support from them from July 1, 2025 through June 30, 2026. 			 Yourself and your spouse, if married Your children/stepchildren if you will provide more than half of their support from July 1, 2025 through June 30, 2024 of if the children would be required to provide your information if they were completing a 2026-2027 FAFSA. Any other people if they will live with you and will receive more than half of their financial support from you from July 1, 2025 through June 30, 2024 		
Full name	Relationship	Age	Will be enrolled in college at least half time (yes or no)	College	
1					
2					
3					
4					

Part II – Adjustment type Check all the conditions below that describe your situation and attach the required documents. 1. Death of parent or spouse ☐ Enter the date of death: _____ Attach a copy of the death certificate 2. Separation or divorce of parent or student ☐ Enter the date of separation/divorce: ___ ☐ If separated, please attach documentation showing individuals live at separate addresses. Attach a copy of legal separation/divorce or official letter from attorney stating when legal proceedings will begin. 3. Reduction of untaxed income (i.e. child support ended) ☐ Enter the date of change: Attach supporting documentation of lost untaxed income (i.e. court order of child support change). Permanent and total disability ☐ Enter the date of disability: Attach a signed letter from a physician stating the extent and duration of disability. ☐ Attach documentation of year-to-date income. ☐ Attach a Disability Benefit Statement from the Social Security Administration. 5. Loss or reduction of income □ Will your total annual household income be lowest for 2024 or 2025? ____ 2024 ____ 2025 ☐ Required documentation for 2024: ☐ Verification of severance amount received in 2023 (if applicable) Required documentation for 2026: ☐ Employer letter/document stating when your employment ended or changed ☐ Verification of severance amount received in 2024 (if applicable) ☐ Unemployment Benefits Statement (if applicable) ☐ Final paystub from prior job with details about your current and year-to-date earnings (if applicable) ☐ Most recent paystubs from all current jobs for student and parent(s) or spouse ☐ Complete Part III – Estimated 2025 Income on page 4 6. Unusually high medical expenses during 2023, 2024, or 2025 ☐ Which year were they highest? ____ 2023 ____ 2024 ____ 2025 Attach a copy of your IRS Schedule A for year selected above. Attach verification of payments made toward medical expenses for year selected above. Explanation of Special Circumstances (to be completed by parent or independent student): Please provide specific details about the changes in your financial situation since 2023. Include a timeline of any income changes and relevant employer names.

ATTACH ADDITIONAL SHEET IF NECESSARY

Part III – Estimated 2025 Income

If your total 2026 income will be lower than your 2025 income, you must complete this section.

- Complete both tables. Report all of your income before exemptions, adjustments and deductions.
- Include all income/benefits that you and/or your parent(s)/spouse expect to receive from January 1, 2026 through December 31, 2027.
- Complete all items. If an item does not apply, you must enter "0".

	Dependent Students	Parent	Parent/Stepparent
2026 Estimated Gross Taxable Income	Independent Students	Student	Spouse
Wages, salaries, tips (including severance pay)		\$	\$
2. Pensions and annuities		\$	\$
3. Interest, dividends and capital gains		\$	\$
4. Business or farm income		\$	\$
5. Social Security benefits (taxable)		\$	\$
6. Income received from rents after expenses (mortgage interest, taxes and ins.)		\$	\$
7. Alimony		\$	\$
8. Unemployment compensation		\$	\$
9. Any other taxed income		\$	\$
Total 2023 Estimated Taxed Income (1-9)		\$	\$

	Dependent Students	Parent	Parent/Stepparent
2026 Estimated Untaxed Income	Independent Students	Student	Spouse
1. Payment to tax deferred pension and savings plan (paid directly or withheld from earnings). Including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.			\$
2. IRA deductions and payments to self-employed SEP, SIMPLE and Keogh		\$	\$
3. Child support received for all children.		\$	\$
4. Tax exempt interest income.		\$	\$

5. Untaxed portions of IRA distributions. 6. Untaxed portions of pensions. 7. Living and housing allowances for clergy, military and others. • Include cash payments or cash value of benefits • Exclude rent subsidies for low income housing. • Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2025. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. 8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. \$ 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): \$ Total 2025 Estimated Untaxed Income (1-10) \$ \$ Total 2025 Estimated Untaxed Income (1-10) \$ \$ The Required Documentation and diction to the information requested in Part II, you must also attach all of the documentation listed below. Forms without I documentation will not be reviewed.			
7. Living and housing allowances for clergy, military and others. • Include cash payments or cash value of benefits • Exclude rent subsidies for low income housing. • Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2025. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. 8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. \$ 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s):	5. Untaxed portions of IRA distributions.	\$	\$
 Include cash payments or cash value of benefits Exclude rent subsidies for low income housing. Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2025. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. Any other untaxed income and benefits such as Workers Compensation, disability, etc. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s):	6. Untaxed portions of pensions.	\$	\$
 Exclude rent subsidies for low income housing. Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2025. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. Any other untaxed income and benefits such as Workers Compensation, disability, etc. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s):	· · · · · · · · · · · · · · · · · · ·		
Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2025. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. 8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): Total 2025 Estimated Untaxed Income (1-10) \$ art IV – Required Documentation addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	± •		
Subsistence (BAS) benefits for 2025. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. 8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): \$ Total 2025 Estimated Untaxed Income (1-10) \$ \$ art IV – Required Documentation addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	· · · · · · · · · · · · · · · · · · ·		
(BAH/BAQ) or the value of on-base military housing. 8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): S Total 2025 Estimated Untaxed Income (1-10) \$ \$ \$ \$ addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without			
8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. \$ 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): \$ Total 2025 Estimated Untaxed Income (1-10) \$ \$ addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	, , ,		\$
Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. 9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. \$ 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s):	(BAH/BAQ) or the value of on-base military housing.	\$	
9. Any other untaxed income and benefits such as Workers Compensation, disability, etc. \$ 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s):	8. Veteran's non-education benefits such as Disability, Death Pension, or Dependency &		\$
\$ 10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): \$ Total 2025 Estimated Untaxed Income (1-10) \$ and IV – Required Documentation and addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	
this form. List type(s):	9. Any other untaxed income and benefits such as Workers Compensation, disability, etc.	\$	\$
List type(s): \$ Total 2025 Estimated Untaxed Income (1-10) \$ art IV – Required Documentation addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	10. Cash support or money paid on behalf of the student or family, not reported elsewhere on		
Total 2025 Estimated Untaxed Income (1-10) \$ \$ rt IV – Required Documentation addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	this form.		
Total 2025 Estimated Untaxed Income (1-10) \$ \$ surt IV – Required Documentation addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	List type(s):		\$
art IV – Required Documentation addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without		\$	
addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	Total 2025 Estimated Untaxed Income (1-10)	\$	\$
addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without			
addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without	AND THE STATE OF T		
		4! 1! . 4	. J.bl E 24b
documentation will not be reviewed.		ation list	ed below. Forms withou
	i documentation will not be reviewed.		
All Students:	All Students:		

All Students: ☐ Student's 2024 and 2025 IRS Tax Transcript or 20 ☐ Student's 2024 and 2025 W-2 form(s) for all 2024 ☐ All required documentation from Part II	
Dependent students must also submit: ☐ Parent(s)' 2024 and 2025 IRS Tax Transcript(s) or ☐ Parent(s)' 2024 and 2025 W-2 form(s) for all 2024	_
Married students must also submit: □ Spouse's 2023 and 2024 IRS Tax Transcript or 202 Part V – Certification □ I certify that the information on this form is true and correct □ I understand that if I underestimate my income, I may have the	to the best of my knowledge and belief.
Student Signature	Date
Parent Signature (dependent student)	Date
Parent's name (please print)	Parent contact information

Please return to the Financial Aid Office: in-person, by email to FinAid@wheeling.edu, fax to 304-243-2500, or Mail: Wheeling University Financial Aid, 316 Washington Ave, Wheeling, WV 26003