



## Part II – Adjustment type

Check all the conditions below that describe your situation and **attach the required documents**.

1. Parent or spouse of student died after October 1, 2016.
  - Enter the date of death: \_\_\_\_\_
  - Attach a copy of the death certificate.
2. Parents have separated/divorced or a married independent student has separated/divorced after October 1, 2016.
  - Enter the date of separation/divorce: \_\_\_\_\_
  - Attach a copy of legal separation/divorce or official letter from attorney stating when legal proceedings will begin.
3. Untaxed income received in 2015 has ceased or has been reduced (i.e. child support ended).
  - Enter date of change: \_\_\_\_\_
  - Attach supporting documentation of lost untaxed income. (Example: divorce agreement for child support change).
4. Parent, spouse or student suffered permanent and total disability after January 1, 2016.
  - Enter 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. Parent(s) of a dependent student or an independent student (or spouse, if married) experienced a significant reduction in annual income since 2015 because of job loss or reduction in pay/hours (excludes overtime hours).

Will your total annual household income be lowest for 2016 or 2017?    \_\_\_2016    \_\_\_2017

Provide the required documentation for the year you selected above.

**Required Documentation for 2016:**

  - Verification of severance amount received in 2015 (if applicable)

**Required Documentation for 2017:**

  - Employer letter/document stating when your employment ended or changed
  - Verification of severance amount received in 2016 (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
6. Parent(s)/spouse/student paid unusually high medical expenses during 2015, 2016 or 2017.
  - Which year were they highest?    \_\_\_ 2015    \_\_\_2016    \_\_\_2017
  - Submit a copy of your IRS Schedule A (Itemized Deductions) if applicable and verification of payments made toward medical expenses for whichever year selected above.



### Part III – Estimated 2017 Income

If your total 2017 income will be lower than your 2016 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, 2017 through December 31, 2017
- Complete all items. If an item does not apply, you must enter “0”.

2017 Estimated Gross Taxable Income	Dependent Students Only:	Parent	Parent/Stepparent
	Independent Students Only:	Student	Spouse
1. 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 2017 Estimated Taxed Income (1-9)		\$	\$

2017 Estimated Untaxed Income	Dependent Students Only:	Parent	Parent/Stepparent
	Independent Students Only:	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. <ul style="list-style-type: none"> <li>• Include cash payments or cash value of benefits</li> <li>• Exclude rent subsidies for low income housing.</li> <li>• Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2017. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing.</li> </ul>		\$	\$
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 2017 Estimated Untaxed Income (1-10)		\$	\$

**Part IV – Required Documentation**

**In addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without all documentation will not be reviewed.**

All Students:

- Student’s 2015 and 2016 IRS Tax Transcript or 2015 and 2016 IRS Verification of Non-filing letter
- Student’s 2015 and 2016 W-2 form(s) for all 2015 and 2016 employers
- All required documentation from Part II

Dependent students must also submit:

- Parent(s)’ 2015 and 2016 IRS Tax Transcript(s) or 2015 and 2016 IRS Verification of Non-filing letter
- Parent(s)’ 2015 and 2016 W-2 form(s) for all 2015 and 2016 employers

Married students must also submit:

- Spouse’s 2015 and 2016 IRS Tax Transcript or 2015 and 2016 IRS Verification of Non-filing letter

**Part V – Certification**

- I understand that I must submit this form after January 1, 2017.
- I certify that the information on this form is true and correct to the best of my knowledge and belief.
- I understand that if I underestimate my income, I may have to repay any aid that I receive based on that data.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent’s name (please print)

\_\_\_\_\_  
Parent contact information

Please drop off in person at the Financial Aid Office or submit via one of the following ways:

- Email: [finaid@wju.edu](mailto:finaid@wju.edu)
- Fax: 304-243-4397
- Mail: WJU Office of Financial Aid  
316 Washington Ave.  
Wheeling, WV 26003