

Financial Aid Appeal Application

2023-2024

Student Name (please print) _____

Student ID (if known) _____

1. Important Information

Please carefully read these instructions and all sections of this form. Incomplete appeals will be denied.

1. **Everyone** is required to complete Sections 2, 6 and 7 of this form.
2. Provide documentation listed under 'documentation required' for the circumstances you select.
3. Answer Sections 3 – 5 **ONLY** if they are relevant to your situation.

We are unable to consider appeals based on the following:

- Comparison of other financial aid packages
- Consumer debt
- Expenses/Situations that have not yet occurred
- Results from the Net Price Calculator
- Voluntary change in employment

Deadlines

Early Decision I Applicants	January 6, 2023
Early Decision II Applicants	March 4, 2023
Regular Decision Applicants	April 25, 2023
Current Students	October 15, 2023

If your circumstances change after these deadlines, please contact our office.

2. Reason(s) for Appeal

Check All that Apply	Documentation Required
<input type="checkbox"/> Loss of Employment and/or Income Date of Employment Loss: _____	<ul style="list-style-type: none"> ▪ Proof of employment loss, such as termination letter, severance statement or unemployment benefits statement ▪ Sections 3 and 6 of this form
<input type="checkbox"/> Reduction of Work Hours/Salary Date Reduction Occurred: _____ Pay Rate Prior to Change: _____ New Pay Rate: _____	<ul style="list-style-type: none"> ▪ Proof of salary change, such as a letter from employer or paystubs showing prior salary & new salary ▪ Most recent paystubs from past month for all parents ▪ Sections 3 and 6 of this form
<input type="checkbox"/> One-Time Source of Income One-time income amount: _____	<ul style="list-style-type: none"> ▪ Copy of parent's 2022 Federal Tax Return OR if 2022 Federal Tax Return is not available, provide copies of parent's 2020 & 2019 taxes ▪ Reason for one-time source of income (see Section 6 of this form)
<input type="checkbox"/> Recent Divorce/Separation of Parents Date Occurred: _____	<ul style="list-style-type: none"> ▪ Proof of physical separation, such as utility bills showing parents' names and different addresses or lease/rental agreements
<input type="checkbox"/> Death of the student's parent Date of Loss: _____	<ul style="list-style-type: none"> ▪ Documentation of medical and/or funeral expenses for parent ▪ Section 5 of this form
<input type="checkbox"/> End of Benefits Type of Benefit: _____ Date Benefit Ends: _____	List end of benefits that provided income to your household such as child support, alimony, social security or disability. <ul style="list-style-type: none"> ▪ Complete Pitzer's End of Benefits form
<input type="checkbox"/> Parent Education Loan Repayments Monthly Payment Amount: _____	<ul style="list-style-type: none"> ▪ Current loan statement(s) reflecting present balance and recent payments ▪ Proof payment was required during pandemic
<input type="checkbox"/> High Medical/Dental/Vision Expenses Amount paid in 2021: _____ Amount paid in 2022: _____	High medical expenses must exceed 4.2% of your total income. Do not include insurance premiums, reimbursed expenses, or FSA/HSA contributions. <ul style="list-style-type: none"> ▪ See Section 5 of this form
<input type="checkbox"/> Sibling Elementary/Middle/High School Tuition Amount paid in 22-23: _____ Amount expected to pay in 23-24: _____	<ul style="list-style-type: none"> ▪ Private school tuition bill or contract showing tuition payments for 2022-23 academic year ▪ Private school tuition contract showing estimates for 2023-24 academic year
<input type="checkbox"/> Elder Care Expenses Amount spent in 2021: _____ Amount spent in 2022: _____	<ul style="list-style-type: none"> ▪ Most recent bills/statement/receipts for elder care expenses paid in the last two months ▪ Describe the type of expenses paid and the frequency of support on Section 6 of this form
<input type="checkbox"/> Natural Disaster Date Disaster Occurred: _____ Type of Disaster: _____	<ul style="list-style-type: none"> ▪ Insurance policies, which may include home, car and/or business to document deductibles or unreimbursed expenses ▪ Contractor quotes, invoices or receipts ▪ FEMA Application (if applicable)

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3. Income Projections

Complete this section if you are appealing for a change to income or one-time source of income. To the best of your ability, please estimate all sources of income that you will or may receive in 2023. If something does not apply to you, please write \$0 or N/A. Forms completed entirely with zeros will not be considered.

2023 Income January 1, 2023 – December 31, 2023	Sources of Income
\$ _____	Earnings from _____ (Parent/Stepparent 1 Name)
\$ _____	Earnings from _____ (Parent/Stepparent 2 Name, if applicable)
\$ _____	Net profit from business or farm (do not include losses)
\$ _____	Other taxable income (interest/dividend income, rental income, alimony, pensions, unemployment, annuities, capital gain, royalties, partnerships, estates, severance, etc.)
\$ _____	Other untaxed income (disability benefits, child support, social security benefits, welfare benefits, workman's compensation, cash support from others, etc.)

4. Job Loss or Salary Reduction

Do you intend to pull money from your retirement to supplement your income loss? If yes, please provide details below.

What is your profession/type of work?

Based on the current job market and your profession, how long do you anticipate being unemployed or underemployed?

5. Other Questions (answer those that apply to your situation)

If you paid medical expenses that exceeded 4.2% of your income in 2021, did you itemize those medical expenses on Schedule A of your 2021 taxes?

Yes	No
<ul style="list-style-type: none"> ▪ Provide a breakdown of the expenses you itemized on Schedule A of your taxes. ▪ Breakdown must list what portion of the expenses were premiums, co-pays, therapy, prescriptions, etc. ▪ You may use Section 6 of this form to provide this breakdown. 	<ul style="list-style-type: none"> ▪ Provide documentation of all medical expenses paid in 2021. ▪ Documentation must show the amount paid and date of payment. ▪ Do not submit documentation for bills that were not paid. ▪ Only expenses that can be documented can be considered.

If your parent has passed away, please provide information on any life insurance policies (amount, payout date, etc.).

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6. Written Statement

7. Certification

I certify that the information reported on this form and all supporting documentation is true and accurate to the best of my knowledge. I understand that false statements or misrepresentation will be cause for denial, reduction, withdrawal and/or repayment of financial aid.

I also certify that I understand the following:

Student Initials

Parent Initials

_____ There is no guarantee that an appeal will result in additional funding.

_____ Any revisions and adjustments based on this appeal are not guaranteed in future academic years.

_____ If any circumstances of this appeal continue, it is the student's responsibility to resubmit an appeal application and supporting documents by the March 2 reapplication deadline for returning students.

_____ The student is still responsible for making timely payments (if attending Pitzer). This request **does NOT** extend any payment deadlines or waive any late payment fees.

_____ The decision and results of this appeal are final.

Student Signature

Date

Parent Signature

Print Name

Date