

# SPECIAL CIRCUMSTANCES (DEPENDENT STUDENT)

2026-2027

Student Name: \_\_\_\_\_ SMUMN ID: \_\_\_\_\_

Parent Name(s): \_\_\_\_\_

Parent Email Address: \_\_\_\_\_

Parent Daytime Phone Number: \_\_\_\_\_

## STEP 1: DOCUMENTATION

Please submit the following documentation, regardless of your reason for filing this request. Failure to submit required documentation will delay processing. If you have already submitted these forms to our office, they do not have to be submitted again. Imported information from the IRS in the FAFSA does not exempt you from submitting the documentation listed below, unless specifically stated.\*

- ☐ Letter or email explaining the special circumstances situation and the outcome you are hoping for with this appeal.
- ☐ Documentation listed below that best fits your circumstance.

## STEP 2: REASON FOR FILING

Check the box for all circumstance(s) that apply to you and submit the additional documentation as indicated for that circumstance. *Be sure to review the second page.*

### ☐ LOSS OF EMPLOYMENT/REDUCED WAGES

Parents (all contributors) wages in 2025 or 2026 are at least 10% less than in 2024 due to loss of job (after a minimum of 6 weeks), change in employment, or reduction in hours or pay. Please provide all applicable documents.

- ☐ 2025 or 2026 signed (if filed and available) Federal Tax Returns, including all pages, schedules, and W2s
- ☐ Most recent check stub(s) from previous/current employer for parent(s) listed on the FAFSA
- ☐ Parent(s) estimated 2026 earnings:  
Parent 1: \$ \_\_\_\_\_  
Parent 2: \$ \_\_\_\_\_
- ☐ Letter from previous employer stating last date of employment
- ☐ Severance information, if applicable
- ☐ Individuals with self-employment, or other non-W2 income from the tax return, need to document their financial changes in the special circumstance letter

### ☐ MARITAL SEPARATION/DIVORCE

Parents must live in separate residences.

- ☐ Documentation of separation, divorce, or verification of separate residences
- ☐ Documentation of child support, family support, or maintenance support; include support that is received or anticipated

### ☐ WIDOWED PARENT

If a parent has passed since filing their 2024 taxes.

- ☐ Documentation of death
- ☐ Documentation of year-to-date earnings for deceased parent



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*Please see additional information on second page/reverse side.*

☐ **HIGH MEDICAL/DENTAL EXPENSES**

Eligible expenses are limited to medical and dental expenses not reimbursed through insurance or employer-sponsored plans (HRA, HAS, health care flexible spending accounts, etc.). As a general rule, **these expenses would need to exceed \$3,500 before they would have the potential to impact a financial aid award.**

- ☐ If medical expenses were incurred in 2024, submit a copy of Schedule A, along with pages 1 and 2 from 2024 Federal Tax Return.
- ☐ If medical expenses were incurred in 2025, submit a copy of Schedule A, along with pages 1 and 2 from 2025 Federal Tax Return.
- ☐ If expenses were not claimed on Schedule A, submit a listing of eligible expenses (including receipts paid) you paid out-of-pocket for in 2024 and/or 2025.

☐ **OTHER UNUSUAL EXPENSES**

- ☐ Provide explanation and documentation of expense(s)

*Examples of eligible expenses:* Dependent care, elderly care, funeral expenses, legal expenses, etc.

**Consumer debt is not eligible for consideration under special circumstances.**

☐ **ONE-TIME INCOME** (\*Imported from IRS on FAFSA)

- ☐ Provide documentation (if available), or an explanation and dollar amount, of any one-time income received and what was done with that income

☐ **PRIVATE ELEMENTARY/SECONDARY TUITION**

(\*Imported from IRS on FAFSA)

- ☐ Submit tuition statement or letter from the school indicating tuition charges minus financial aid and/or discounts for child(ren) at that school

☐ **LOSS OF BUSINESS OR FARM DUE TO BANKRUPTCY OR FORECLOSURE**

- ☐ Provide documentation detailing the date of loss, including business/farm assets

☐ **LOSS OF SOCIAL SECURITY AND/OR CHILD SUPPORT RECEIVED** (\*Imported from IRS on FAFSA)

- ☐ Amount received in:

2024 \$ \_\_\_\_\_

2025 \$ \_\_\_\_\_

2026 \$ \_\_\_\_\_ (estimated for year)

**Note: All appeals for the 2026-2027 academic year must be submitted as soon as possible. Reviews can take up to four weeks and the Financial Aid Office cannot make adjustments to aid if a student is not actively enrolled/attending classes.**

**STEP 3: CERTIFICATION**

By signing below, you certify that the information provided on this Saint Mary's University of Minnesota Special Financial Circumstances form is complete and accurate.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Return this completed form along with all necessary documentation to:

**Saint Mary's University of Minnesota**  
Financial Aid Office  
700 Terrace Heights #5  
Winona, MN 55987

Fax: 507-457-6997  
Email: [financialaid@smumn.edu](mailto:financialaid@smumn.edu)