

# LINDENWOOD

## 2020-2021 Financial Aid Professional Judgment Checklist

If your financial situation has changed and you feel the income information on your FAFSA no longer accurately reflects your family's current income, you may consider submitting documents to be reviewed for a professional judgment. **Please note that not every situation warrants a review nor does every review guarantee a change in any federal aid awards.**

- Unusual personal living expenses, personal indebtedness, and retirement are examples of circumstances that **do not** permit a professional judgment review.
- You must be able to provide **all** valid supporting documents in order for your FAFSA to be considered for review.
- Reviews for professional judgments are taken into consideration for financial situations that have taken place within the current academic year.
- All verification forms and IRS documents must be signed and dated. Typed signatures will not be accepted. Please gather all required documents first and upload all of the documents at the same time.

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Last Name

First Name

M.I.

Social Security Number or Student ID#

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Address (include apt. #)

City

State

ZIP Code

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Date of Birth

Lindenwood E-mail Address

Phone Number (include area code)

2020-2021 Verification forms: [www.lindenwood.edu/sfs-forms](http://www.lindenwood.edu/sfs-forms)  
Submit documents here: [www.lindenwood.edu/sfs-secure](http://www.lindenwood.edu/sfs-secure)

Current Financial Situation	Required Documents
<p><input type="checkbox"/> <b>Loss of Employment</b> The loss of employment must be due to no fault of your own: laid off, company downsized, outsourced position, medical reasons, etc.</p> <p><input type="checkbox"/> <b>Related to COVID-19</b> Lindenwood University understands that the hardship you or your parent experienced may have been related to circumstances around the COVID-19 pandemic. Please check this box if this applies to your situation so that we may evaluate your Financial Aid eligibility accordingly.</p>	<p><input type="checkbox"/> 2020-2021 Verification Worksheet</p> <p><input type="checkbox"/> <b>Signed</b> copy of 2018 <b>and</b> 2019 IRS 1040 Federal Income Tax Return and Schedules 1, 2 &amp; 3 if applicable</p> <p><input type="checkbox"/> Signed/dated letter of explanation from student requesting an income adjustment</p> <p><input type="checkbox"/> Signed/dated letter from employer stating <b>WHEN</b> and <b>WHY</b> individual was terminated and/or lost their job</p> <p><input type="checkbox"/> Copy of severance package (if applicable)</p> <p><input type="checkbox"/> Current unemployment benefit summary of person that lost their job</p> <p><input type="checkbox"/> Copy of the most recent 2020 paycheck stub from each person in the household</p>

Current Financial Situation	Required Documents
<input type="checkbox"/> <b>Death of a Spouse or Parent</b>	<input type="checkbox"/> 2020-2021 Verification Worksheet <input type="checkbox"/> <b>Signed</b> copy of 2018 <b>and</b> 2019 IRS 1040 Federal Income Tax Return and Schedules 1, 2 & 3 if applicable <input type="checkbox"/> Copy of death certificate <input type="checkbox"/> Copy of the surviving spouse <b>or</b> parent's 2018 <b>and</b> 2019 W2's <b>or</b> a signed statement (if they filed a joint tax return)
<input type="checkbox"/> <b>Divorce or Separation</b>	<input type="checkbox"/> 2020-2021 Verification Worksheet <input type="checkbox"/> <b>Signed</b> copy of 2018 <b>and</b> 2019 IRS 1040 Federal Income Tax Return and Schedules 1, 2 & 3 if applicable <input type="checkbox"/> Copy of 2018 <b>and</b> 2019 W2's <b>or</b> signed/dated statement verifying the amount of income you earned in 2018 even if that amount is zero <input type="checkbox"/> Copy of divorce decree <b>or</b> legal separation documents <input type="checkbox"/> If not legally divorced <b>or</b> legally separated the following documentation must be submitted: <ul style="list-style-type: none"> <li>▪ Two separate notarized letters, one from each spouse, stating month and year they separated.</li> <li>▪ One current bill (gas/electric/water/sewer/lease agreement) from each spouse showing different addresses. We cannot accept cell phone, cable, or internet bills.</li> </ul>
<input type="checkbox"/> <b>Out-of-Pocket Medical Expenses</b> This situation is only considered <b>IF</b> the out-of-pocket medical expenses paid exceeds the 11% income protection allowance (IPA), which is already included in the EFC calculation on the FAFSA.	<input type="checkbox"/> 2020-2021 Verification Worksheet <input type="checkbox"/> <b>Signed</b> copy of 2018 <b>and</b> 2019 IRS 1040 Federal Income Tax Return and Schedules 1, 2 & 3 if applicable <input type="checkbox"/> Itemized list of 2018 out-of-pocket medical expenses (do not include co-payments and annual deductibles)
<input type="checkbox"/> <b>Tuition Expenses</b> This situation is only considered <b>IF</b> the annual elementary or secondary school tuition exceeds 10% of the family's adjusted gross income.	<input type="checkbox"/> 2020-2021 Verification Worksheet <input type="checkbox"/> <b>Signed</b> copy of 2018 <b>and</b> 2019 IRS 1040 Federal Income Tax Return and Schedules 1, 2 & 3 if applicable <input type="checkbox"/> Copy of annual tuition payments for the 2018-2019 school year (statement of payments must be on Elementary or Secondary school letterhead)

**\*Note: Submitting documents by e-mail is not accepted due to security reasons.**

Upload one PDF, Word, or JPEG file to the secure file transfer system here: [www.lindenwood.edu/sfs-secure](http://www.lindenwood.edu/sfs-secure)  
 Enter the student's Lindenwood email address, and select UPLOAD.

**Lion, Leo A0001234567**

1. Student Last Name
2. Student First Name
3. Student ID