

## Request for Review of 2024–2025 Financial Aid Award

You may request reconsideration of your financial aid award if your family's financial circumstances have changed significantly or if you have special financial circumstances that were not reported on your initial financial aid application. The Financial Aid Committee will review your request and respond to you in writing.

- If your request is received **by October 15, 2024**, an adjustment will be considered for the full academic year.
- If your request is received **after October 15, 2024 and on or before March 15, 2025**, an adjustment will be considered for the spring term only.

**Student's name:** \_\_\_\_\_

**Date of birth:** \_\_\_\_\_ **Yale student ID number:** \_\_\_\_\_

### Who has had a change in circumstances?

- Custodial parent(s)       Noncustodial parent       Student

### What is the change in circumstances? (check all that apply)

- Termination of employment or other employment change  
 Retirement  
 Disability  
 One-time income on 2022 tax return (e.g., back pay, capital gain, retirement withdrawal)  
 Loss of untaxed income (e.g., child support, Social Security, unemployment benefits)  
 Recent separation/divorce  
 Unusual medical/dental bills  
 Expenses associated with the care of an elderly grandparent  
 Repayment of parents' education loans  
 Other circumstances (explain in personal statement)

### Supporting documentation included (check all that apply)

- Termination/severance letter  
 Most recent paystub showing new/changed salary  
 Final paystub from previous employer  
 Statement of unemployment benefits  
 2023 tax return  
 Copy of medical/dental bills showing unreimbursed expenses  
 Statement of disability benefits  
 Other: \_\_\_\_\_

### Attach a personal statement

You must attach to this form a personal statement explaining the circumstances on which your review request is based and their effect on your family's ability to contribute toward your education costs. Please provide as much detail as possible to help us better understand your family's financial situation.

**Substantial changes in 2023 and/or 2024 income**

- If your review request is based on a substantial change to your income **beginning in 2023** and continuing into 2024, please include a copy of your **2023 federal tax return** (with schedules and W2s) in your documentation.
- If your review request is based on a substantial change to your income **beginning in 2024**, please **itemize below** all sources of income, both taxed and untaxed, that you expect to receive in 2024. Use **pre-tax** income figures and include a number for each item; **if the amount is zero, put \$0.**

<b>Anticipated 2024 income source</b>	<b>2024 pre-tax amount</b>
Parent 1’s wages, salaries, tips (Parent’s name _____)	\$ _____
Parent 2’s wages, salaries, tips (Parent’s name _____)	\$ _____
Interest income	\$ _____
Dividends	\$ _____
Alimony received	\$ _____
Net income from business or farm	\$ _____
Net rental income (or loss)	\$ _____
Pensions, annuities, royalties, partnerships, estates, trusts, etc.	\$ _____
IRA distributions	\$ _____
Capital gains (or losses)	\$ _____
Unemployment compensation, severance pay, etc.	\$ _____
Other taxable income (Specify sources: _____)	\$ _____
Child support received	\$ _____
Contribution to tax-deferred retirement plans (401k, 403b, etc.)	\$ _____
Untaxed disability income	\$ _____
Social Security	\$ _____
Housing and living allowance paid to clergy, military, etc.	\$ _____
Other untaxed income (Specify sources: _____)	\$ _____
<b>TOTAL</b>	<b>\$ _____</b>

I certify that all information reported on this form is complete and correct as of this date. I realize that the Undergraduate Financial Aid Office may request additional documentation in support of any information provided here, and I understand that submission of this form does not guarantee an increase in financial aid.

Student’s signature \_\_\_\_\_ Date \_\_\_\_\_

Parent’s signature \_\_\_\_\_ Date \_\_\_\_\_