A Financial Reevaluation Statement should be filed if one of the following circumstances is present:

1) disability (parent, student, or spouse);
2) loss of employment, reduced employment or retirement (parent, independent student, or spouse);
3) divorce, separation (parents or student) or death (parent or spouse).

- As part of the Reevaluation process, signed copies of parents’ 2014 Federal tax return or 2014 Federal Tax Return Transcript, including all W-2s, must either be on file with the Office of University Financial Aid or submitted with this form.

- Once your information has been reviewed, you may be eligible for additional financial aid.

- During the review process, you are responsible for all billing statements.

- If you become eligible for additional aid, adjustments will be made to your account when the review is complete.

The following guidelines must be noted and observed:

1) All information relating to the special circumstance, along with documentation requested by the Office of Financial Aid, must be submitted before the review will occur;
2) Incomplete forms or discrepant information will delay the processing of your request for reevaluation.
3) An adjustment will not be made for loss of overtime or one-time capital gains;
4) If the child support you receive stops when your child reaches age 18, provide a copy of the divorce decree which indicates the terms of the child support arrangements;
5) If you are reporting discontinuation of Social Security/Disability payments, please provide copies of the termination letter from the Social Security Administration;
6) Changes resulting from the review of your special circumstances may affect the eligibility for and amount of Federal, State, and institutional aid.

- Include documentation of the extraordinary expenses resulting from your emergency situation (i.e., unreimbursed medical expenses, child care expenses, etc.)

- Submit payroll stubs, bills, receipts, canceled checks, etc., to support the entries made on this form. The following documents are required for the circumstance applicable to you:

  Death of a parent/spouse........................................ Copy of death certificate
  Divorce/separation ................................................ Complete copy of legal agreement
  Loss of employment .............................................. Copy of termination letter from employer (on company letterhead) and last pay stub
  Reduction of Income ............................................... Copy of latest pay stub or statement (on company letterhead) from human resources department or supervisor

- List the student’s name and SIS Student ID number on all documents submitted.

- Parents of dependent students should provide information covering the twelve-month period of January 1, 2015 through December 31, 2015.

- Independent students should provide information covering the twelve month period of June 1, 2015 through May 31, 2016.

Please complete the second page of this form and return it along with the required documentation to:

Case Western Reserve University
Office of University Financial Aid
2049 Martin Luther King Jr. Drive
Cleveland, OH 44106-7049
voice: 216-368-4530
fax: 216-368-5054
http://financialaid.case.edu
financialaid@case.edu
Office of University Financial Aid

#### Parent(s) of Dependent Students:
- **Estimate your total income (taxable & untaxed) from Jan. 1, 2015 to Dec. 31, 2015**

#### Independent Students:
- **Estimate your total income (taxable & untaxed) from June 1, 2015 to May 31, 2016**

#### Reason for Reconsideration
- **A. Disability of:**
  - Student
  - Spouse
  - Parent 1
  - Parent 2
  - Date of Disability: __/__/____

- **B. Death of:**
  - Spouse
  - Parent 1
  - Parent 2
  - Date of Death: __/__/____

- **C. Unemployment**
  - Student
  - Spouse
  - Parent 1
  - Parent 2
  - Date of Separation/Divorce: __/__/____

For dependent students, the custodial parent should complete this Financial Reevaluation Statement.

#### Estimated Taxable Income
**COMPLETE BOTH TAXABLE & UNTAXED COLUMNS**

<table>
<thead>
<tr>
<th>Item</th>
<th>Ind. Student/ (Spouse)</th>
<th>Parent(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Employment income (Student, Parent 1)</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>2. Employment income (Spouse, Parent 2)</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>3. Interest &amp; dividend income</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>4. Alimony received</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>5. Business and/or farm income</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>6. Partnership and/or S-Corporation income</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>7. Capital gains</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>8. Pensions and annuities</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>9. Rents and royalties</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>10. Unemployment compensation</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>11. Other taxable income</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td><strong>Total Taxable income</strong></td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
</tbody>
</table>

**(Go to Untaxed income column)**

#### Estimated Untaxed Income
**COMPLETE BOTH TAXABLE & UNTAXED COLUMNS**

<table>
<thead>
<tr>
<th>Item</th>
<th>Ind. Student/ (Spouse)</th>
<th>Parent(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Social Security benefits for all family members</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>13. Worker’s compensation</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>14. Retirement and/or disability benefits</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>15. ADC, TANF and/or welfare benefits (excluding Food Stamps)</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>16. Untaxed portions of pensions and/or annuities</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>17. Living and housing allowances for clergy, military, etc.</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>18. Child support received</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>19. Veteran’s non-educational benefits</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>20. Deductible IRA/SEP payments</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td>21. Other untaxed income/benefits</td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
<tr>
<td><strong>Total Untaxed income</strong></td>
<td>$________.00</td>
<td>$________.00</td>
</tr>
</tbody>
</table>

**Total Income (taxed & untaxed):** $________.00

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**I/we affirm that the data contained on this form and submitted with this form are true and complete to the best of my/our knowledge. Upon request, I/we will provide additional documentation to substantiate the information provided here.**

---

**Student’s Signature**

Date____ / ____ / ______

---

**Parent’s/Spouse’s Signature**

Date____ / ____ / ______

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Please complete this form and return it along with the required documentation to:

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- **Office of University Financial Aid**
- **2049 Martin Luther King Jr. Drive**
- **Cleveland, OH 44106-7049**
- **voice: 216-368-4530**
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