

# Yale *Office of Undergraduate Financial Aid*

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Fax: (203) 436-9768

## Request for Review of 2026–2027 Financial Aid

You may request reconsideration of your financial aid 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, 2026**, an adjustment will be considered for the full academic year.
- If your request is received **after October 15, 2026** and **on or before March 15, 2027**, 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 2024 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
- 2025 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 2025 and/or 2026 income**

- If your review request is based on a substantial change to your income **beginning in 2025** and continuing into 2026, please include a copy of your **2025 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 2026**, please **itemize below** all sources of income, both taxed and untaxed, that you expect to receive in 2026. Use **pre-tax** income figures and include a number for each item; **if the amount is zero, put \$0.**

<b>Anticipated 2026 income source</b>	<b>2026 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>	\$ _____

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 \_\_\_\_\_