Yale *Office of Undergraduate Financial Aid*

Upload: *finaid.yale.edu/upload*
Fax: (203) 436-9768

Request for Review of 2022–2023 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, 2022,** an adjustment will be considered for the full academic year.
- If your request is received **after October 15, 2022** and **on or before March 15, 2023,** 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 2020 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
☐ 2021 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 2021 and/or 2022 income

- If your review request is based on a substantial change to your income **beginning in 2021** and continuing into 2022, please include a copy of your **2021 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 2022,** please **itemize below** all sources of income, both taxed and untaxed, that you expect to receive in 2022. Use **pre-tax** income figures and include a number for each item; **if the amount is zero, put $0.**

Anticipated 2022 income source	**2022 pre-tax amount**
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: _____)	$_____
TOTAL	$_____

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 _____