



Returning Student Special Circumstances Questionnaire 2026-27

Submit All Documents To:

Financial Aid Office
Illinois Wesleyan University
PO Box 2900
Bloomington, IL 61702
P (309) 556-3096 F (309) 556-3833
iwufaid@iwu.edu

2026-2027 Special Circumstances Questionnaire

Student's Info _____
Name
ID #
Phone Number

Address _____
Street
City
St
ZIP

Parent Information

Student Information

For more information on how to answer each question, instructions are located on page 5. **Do not leave blank lines.** Please indicate "N/A" if there is no information to available.

1. Parent(s') estimated Adjusted Gross Income (AGI).

2025 _____ 2026 _____

2. Parent(s') estimated income tax paid.

2025 _____ 2026 _____

3. Parent 1 – Estimated wages/earnings. This figure should be a portion of the AGI.

2025 _____ 2026 _____

4. Parent 2 – Estimated wages/earnings. This figure should be a portion of the AGI.

2025 _____ 2026 _____

5. Parent's total Unemployment Compensation in AGI.

2025 _____ 2026 _____

6. Additional Financial Information for Parent(s) (pg. 4).

2025 _____ 2026 _____

7. Worksheet for Untaxed Income for Parent(s) (pg. 4).

2025 _____ 2026 _____

8. Medical expenses that were not covered by insurance, Flex spending accounts, and/or health savings accounts.

2025 _____ 2026 _____

1. Student's estimated Adjusted Gross Income (AGI).

2025 _____ 2026 _____

2. Student's estimated income tax paid.

2025 _____ 2026 _____

3. Student's estimated wages, salaries, and/or tips.

2025 _____ 2026 _____

4. Additional Financial Aid Information for Student (pg. 4).

2025 _____ 2026 _____

5. Worksheet for Untaxed Income for Student (pg. 4).

2025 _____ 2026 _____

Explanation of Circumstances

The IWU Financial Aid Application and Free Application for Federal Student Aid (FAFSA) may not reflect your unusual financial circumstances. Listed below are special circumstances which may warrant an adjustment to your financial aid proposal. Check all of the below circumstances which may apply to you and your family's situation. You will also need to submit documentation to support your special circumstances. The Required Documents section below lists what is typically collected for most situations. The Financial Aid Office may request additional documentation in order to properly document your situation.

_____ 1. Loss or Reduction of Income

My family is experiencing a loss or reduction of income as of _____ due to the following:

Date of Incident

_____ Unemployment

_____ Loss of Unemployment Compensation

_____ Reduced Wages or Furloughs

_____ Death or Disability

_____ Dual Household Expenses

_____ Other (Detailed Below)

_____ 2. Parents Recently _____ Divorced/Separated _____ Date of Status Change

_____ 3. Paying High Medical Expenses Not Covered by Insurance, Flexible Spending, and/or Health Savings Accounts

_____ 4. Other: _____

Required Documents

Please submit the following documentation to support your situation. Other documentation may be requested to document your special circumstances.

1. Provide a detailed description, including actual cost to you, of your situation. Include documentation when asked.
2. Give the date the special circumstance occurred and a timeframe you expect it to end.
3. Include all 2024 W-2 information and a signed copy of your 2024 Federal Tax Return including all schedules.
4. Include all 2025 W-2 information and a signed copy of your 2025 Federal Tax Return (if available) including all schedules.
5. Include a copy of at least 2 months' worth of your most recent 2026 paystubs.

2026-2027 Special Circumstances Questionnaire, continued

Do not leave blank lines. Please indicate "N/A" if there is no information to available.

Parent(s)		Additional Financial Information	Student	
2025	2026		2025	2026
		a. Education credits (Hope and Learning tax credits) from IRS form 1040 schedule 3 line 3.		
		b. Child Support paid because of divorce decree or separation due to legal requirements.		
		c. Taxable earnings from need-based employment programs such as Work Study and need-based portions of fellowships, and/or assistantships.		
		d. Grant and scholarship aid reported as taxable income in the Adjusted Gross Income. Includes AmeriCorps benefits, fellowship, and assistantships funds.		
		Totals for Parent Question 6	Totals for Student Question 4	

Parent(s)		Worksheet for Untaxed Income	Student	
2025	2026		2025	2026
		a. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040 – schedule 1 line 15		
		b. Child support received for all children. Do not include foster care or adoption payments		
		c. Tax exempt Interest income from IRS Form 1040 – line 2a minus line 2b.		
		d. Untaxed portions of IRA distributions from IRS Form 1040 – lines 4a minus 4b or 1040A Lines 4a minus 4b. Exclude rollovers. If negative, enter \$0 here.		
		e. Untaxed portions of pensions from IRS Form 1040 – lines 5a minus 5d. Exclude rollovers If negative, enter in \$0 here.		
		Totals for Parent Question 7	Totals for Student Question 5	

Parent and Student Signatures

This form requires a manual signature, not electronic, by both the student and one custodial parent. Please print, sign, and date below.

I (we) understand that the Financial Aid Office may verify all income, asset, and cost information at a later time. Should this later verification prove the earlier estimate to be inaccurate, I (we) will submit new information in writing. I (we) also understand that financial aid awards issued on the basis of inaccurate parent/student information are subject to revision, including cancellation and back billing. I (we) affirm and attest that the information provided is true, complete, and accurate to the best of my (our) knowledge.

Student Signature

Date

Parent Signature

Date

Questionnaire Instructions

Please use these instructions to complete the questions from page 2. The 2025 IRS lines are provided as a **guide** to estimate current or future income figures in the event that a more recent tax return information is unavailable. We would encourage you to use your most recent tax return information to answer each question where possible.

Parent Information

1. Report or Estimate the Parent(s') AGI. 2025 IRS Form:
1040 line 11a
****Do not include non-custodial parent income****
2. Report or Estimate the Parent(s') Income Tax Paid. 2025
IRS Form: 1040 line 22
****Do not include FICA, Self-Employment, or other taxes****
3. Report or Estimate Parent Wages. 2025 IRS Form:
1040 line 1a
****If you own a business or farm, also add lines
3 and 6 from Schedule 1. ****
4. Refer to question 3 instructions.
5. See line 7 on Schedule 1 of IRS 1040 Form.
6. Complete Parent Additional Financial Information on page 3.
7. Complete Parent Untaxed Income Information on page 3.

Student Information

1. Report or Estimate the Student's AGI. 2025 IRS
Form: -1040 line 11a
 2. Report or Estimate the Student's Income Tax Paid.
2025 IRS Form: 1040 line 22
****Do not include FICA, Self-Employment, or other taxes****
 3. Report or Estimate Student's wages. 2025 IRS Form:
-1040 line 1a
 4. Complete Student Additional Financial Information
on page 3.
 5. Complete Student Untaxed Income Information
on page 3.
8. These figures should include all out-of-pocket payments (such as co-pays and other payments) made after insurance, flex-spending, and/or health savings account payments. Medical expense appeals require documentation such as, but not limited to receipts, copies of canceled checks, and/or account summaries showing 'out of pocket' payments made.

Policies and Adjustments

Policy

To qualify for most financial aid programs, a family must demonstrate 'financial need.' Financial need is the difference between the cost of your education and the amount you and your family are expected to contribute to your education, as determined by the Financial Aid Office from the information you supply when you apply for financial aid.

The formula considers both the income and assets of the family. The data needed for the analysis is collected from the Free Application for Federal Student Aid (FAFSA). The Financial Aid Office determines the accuracy and reasonableness of the data by comparing it to the tax return and/or other financial information. Separate contributions toward the cost of education are calculated for the student and the parents. The two combined contributions constitute the Student Aid Index.

This form is a request for a re-evaluation of your financial aid eligibility due to changes in your situation from the time you applied for financial aid. When considering your circumstances, the Financial Aid Office takes into account the availability of funds, the timeliness of your original application for financial aid, the timeliness of your questionnaire, and the nature of the change in circumstances. Approval decisions are subject to Federal, State, and University regulations and not every situation is eligible for an approval.

Funding and Financial Aid Adjustments

Due to limited availability of assistance, approved appeals may be funded with IWU, State, and/or Federal grants in addition to student loans. Regardless of circumstances, additional awards may be provided only if money is available at the time your appeal is reviewed.

How to Appeal the Family Contribution

You may complete the enclosed questionnaire including an explanation letter which details your change in circumstances. Please also include any supporting documentation with this form and return the requested information to the IWU Financial Aid Office.