

2017-18 Letter of Special Circumstances

Student Name: _____ Student ID: _____

Submitted by: Custodial Parent Non-custodial Parent Student

INSTRUCTIONS:

- **If you have not yet completed your submission to IDOC**, submit this completed form all required documentation to IDOC with the rest of your taxes when you apply for aid.
- **If you have already completed your submission to IDOC** and did not include this form and required documentation, please instead send this information directly to the Karsh Office of Undergraduate Financial Support.

Please Check	Qualifying Special Circumstances in 2016 or 17
<input type="checkbox"/>	Required Documentation ✓ Copy of rental or lease agreement for second residence ✓ Copies of utility bills
<input type="checkbox"/>	One-Time Income ✓ Documentation of distribution (copy of settlement, letter from employer, Form 1099, etc.) ✓ Listing and documentation of expenses paid from distribution, if it is no longer available
<input type="checkbox"/>	High Medical, Dental, or Funeral Expenses ✓ Documentation of medical or funeral bills paid during prior tax year NOT reimbursed or paid by insurance
<input type="checkbox"/>	Educational Debt ✓ Provide documentation regarding type or cause of debt and holder of debt ✓ Provide documentation of monthly repayment of debt (i.e., monthly loan statements)
<input type="checkbox"/>	Support/Care of Family Members Care of Elderly Parents: ✓ Documentation of monthly support provided for care of parents (i.e., cancelled checks, wire transfers, etc.) ✓ For care of elderly parents in nursing/assisted living, information from care provider documenting monthly support from family. Support of Extended Family: ✓ Documentation of support to relatives outside of the immediate family (cancelled checks, wire transfer records, statement from recipient indicating amount received, etc.)

In certain situations, we can consider special circumstances when determining a family's ability to contribute to a student's educational expenses.

Federal regulations and institutional policies require that exceptions fall within certain guidelines and are documented.

Complete the section at left that applies to the special circumstance(s) you would like us to consider and provide the requested documentation when you submit the form.

Your information will be reviewed and any applicable adjustments will be made based on your family's circumstances.

Please note that loss of income, job loss, and unexpected life events such as parent divorce or death of an immediate family member are not included on this form. We realize these circumstances have significant impacts on our families and are often extremely sensitive in nature. We have therefore designed separate financial aid policies to address these specific concerns.

For more information about family circumstances and their impact on financial aid, please refer to our website's complete guide to how Duke accommodates special circumstances:

<https://financialaid.duke.edu/current-undergraduates/special-circumstances>

If you have any additional questions or concerns, please don't hesitate to contact us.

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Please help us better understand your special circumstances occurring in the 2016 or 2017 calendar year by providing an additional explanation below:

Student/Parent Certification

By signing below:

1. I/We affirm the information provided on this form and in attached documentation is accurate and complete to the best of our knowledge. I/We understand that completing this form does not guarantee financial aid will be increased. Further, I/we understand that any revision based on this information does not guarantee the same adjustments will be made in future semesters and/or academic years.
2. I/We understand the submission of this information does not release the student from the obligation of staying current with the Bursar. I/We understand it is the student's responsibility to maintain good standing with the Bursar.
3. I/We understand the complete information will be reviewed by the Karsh Office of Undergraduate Financial Support and that additional processing time may be necessary in the event more information is requested. I/We understand all applicable circumstances will be considered and appropriate adjustments will be made. Students submitting special circumstance information upon application/reapplication will receive a financial aid award notice based on the information submitted. Students submitting special circumstances after their application/reapplication may receive a revised financial aid award notice.

Signature of Parent: _____ Date: _____

Signature of Student: _____ Date: _____

<https://financialaid.duke.edu/contact>