NORTHERN MICHIGAN UNIVERSITY

2026-2027
Special Circumstance Re-evaluation Student Request

FINANCIAL AID
1401 Presque Isle Avenue
Marquette, MI 49855-5301
906-227-2327 | fax 906-227-2321
fao@nmu.edu | nmu.edu/finaid

RVAL

****An incomplete form will delay processing.****

Student Name _____ **NMU IN** _____

Step 1 – Verification of Current Free Application for Federal Student Aid (FAFSA) Data

Before re-evaluating your financial aid eligibility, the Financial Aid Office will need to verify the information submitted on your FAFSA is correct. To complete this process, you must submit the following documents if you have not already done so:

- 2026-2027 Family Size Verification Worksheet (Dependent version if your parents' information was provided on the FAFSA; otherwise, Independent version)
- 2024 Tax Return Transcript for student (if required to file a return) or a **signed** copy of your 2024 Federal Income Tax Return, including Schedules 1, and 3 (if filed)
- For Dependent Students Only (those who provided parent information on the FAFSA): 2024 Tax Return Transcript for parents or a **signed** copy of your parents' 2024 Federal Income Tax Return, including Schedules 1, 2, and 3 (if filed)

Worksheets may be printed from:
nmu.edu/financialaid/printableforms

Information on requesting tax transcripts can be found at:
nmu.edu/financialaid/verification

Step 2 – Reason for Re-Evaluation Request and Documentation Requirements

Please provide a written statement with the timeline of corresponding events that explain your circumstances, check the appropriate box below, and include the documentation listed. The re-evaluation will not be started until ALL required documents are turned it. ***Please be aware that a re-evaluation request does not guarantee an increase in your financial aid.***

☐ **Loss/Reduction of Employment or Retirement/Military Discharge**
- Documentation from previous employer indicating dates of changes in employment status (letter, exit paperwork, DD214-Member 4 copy, etc.)
- Most recent or final paystub. Ten weeks must have elapsed since loss of employment
- IRS Tax Return Transcript for 2025 or a **signed** copy of your 2024 Federal Income Tax Return, including Schedules 1, and 3 (if filed)
- 2024 and 2025 W-2 Forms
- Verification of unemployment benefits, if applicable
- Verification of severance package, pension, retirement benefits, etc.

☐ **Loss of Other Income – Unemployment Benefits, Taxable Social Security Benefits, Etc.**
- Statement from organization (unemployment office or Social Security) indicating when the income/benefits ended
- Verification of benefit amount received in 2024

☐ **Death of a Spouse After the Date the FAFSA was Filed**
- Copy of Death Certificate
- Copies of 2024 W-2 Forms (or other income documentation)

☐ **Divorce/Separation After the Date the FAFSA was Filed**
- Copy of divorce decree or verification of filing for divorce
- In the case of legal separation, documentation of separate households (lease, mortgage, utility bills)
- Copies of 2024 W-2 Forms or other documents to separate income if a joint return was filed

☐ **Receipt of One-Time Income – Pension Withdrawal, Sale of Home, Etc.**
- Documentation showing the source of the income (Form 1099-R, etc.)
- Verification showing how much of the one-time funding is still available and how funds were spent

☐ **Marriage After the Date the FAFSA was Filed**
- Copy of Marriage License
- Recent paystubs for you and your spouse
- Student's and spouse's IRS 2024 Tax Return Transcripts or a **signed** copies of 2024 Federal Income Tax Returns, including Schedules 1, 2, and 3 (if filed)
- 2026-2027 Independent Student Family Size Verification Worksheet

☐ **Excessive Medical Bills/Insurance Premiums Paid Out of Pocket in 2024**
- Schedule A from Form 1040 if expenses were itemized, or
- Copies of **paid** receipts/cancelled checks
- For insurance premium withheld from earnings, copy of a pay stub
- ***Only include bills paid out of pocket, not those covered/reimbursed by insurance***

☐ **Other**
- Provide a detailed explanation in your letter, as well as appropriate documentation
- Contact our office if you are unsure about what type of documentation to provide

Be sure to complete and submit *both pages* of this form and required documentation. Include the student's name and NMU IN on all items submitted.

Student Name _____ **NMU IN** _____

Although each family's situation is reviewed on an individual basis, the following reasons generally do not result in a change to financial aid eligibility: bankruptcy, foreclosure, private primary/secondary school tuition, or gambling winnings. Please feel free to contact the Financial Aid Office to discuss your situation prior to submitting this form.

Provide income information (or best estimate) for the entire year requested - January 1 through December 31. Be sure to use amounts for the year, rather than monthly amounts. Please do not leave any items blank, we cannot process with incomplete forms. If correct amount is $0, please enter $0.

Step 3 – Income Estimates

January 1 through December 31	2025		2026	
	Student	**Spouse**	**Student**	**Spouse**
Total Wages (include partial year amounts if individual is no longer employed but worked for part of the year)	$	$	$	$
Interest/Dividend Income	$	$	$	$
Unemployment Benefits	$	$	$	$
Severance Pay	$	$	$	$
Taxable Social Security Benefits (do not include untaxed amounts)	$	$	$	$
Child Support Received (include total to be received for all children as well as partial year amounts if benefits will stop or be reduced during the year)	$	$	$	$
Alimony Received	$	$	$	$
Worker's Compensation	$	$	$	$
Retirement Benefits	$	$	$	$
Insurance Benefits	$	$	$	$
Disability Benefits	$	$	$	$
Payments to Tax Deferred Pension/Savings Plans (paid directly or withheld from earnings)	$	$	$	$
Other (list source) _____	$	$	$	$
Total Income	$	$	$	$

A decision on your request may take several weeks to complete, and additional documents may be requested **.**The Financial Aid Office will act on your request for re-evaluation only after receiving all verification and supporting documentation which confirms your circumstances. ***Please be aware that a re-evaluation request does not guarantee an increase in your financial aid.*** An increase in financial aid eligibility depends on the availability of funds and demonstrated financial need. All information will remain strictly confidential.

WARNING: If you purposely give false or misleading information, you may be fined, be sentenced to jail or both.

The person signing below certifies that all of the information reported is complete and correct.

The deadline for processing re-evaluations is November 15 for Fall and April 1st for the full academic year.

Student Signature_____ **Date** _____

*** No Typed Signatures ***

Be sure to complete and submit *both pages* of this form and required documentation. Include the student's name and NMU IN on all items submitted.