

BOSTON COLLEGE

2021–2022 FINANCIAL AID APPEAL FORM AND GUIDELINES

Student's Name _____ Eagle ID Number _____
(please print)

Instructions

Our goal is to accurately review your family's ability to contribute towards your educational costs and provide the most appropriate financial aid package based upon the information provided to our office. We make every effort to provide assistance to all students who qualify. Please be aware that all financial aid awards are need-based.

You may request a review of your financial aid package at any time due to a change in your family's circumstances or in light of new information regarding unusual situations that your family may be facing. Information presented in this appeal should be either new information or information that has changed significantly from your initial application. Please complete all sections of this form as completely and accurately as possible. **Please submit 2020 federal tax returns and 2019 federal tax returns (if not previously received with your financial aid application).** Federal taxes are required for all appeal processing in order to make sure that your application is based on accurate numbers.

Reason for Appeal

Check the box below that most accurately describes your situation. You may check more than one if appropriate. Be sure to complete the back of this form as accurately as possible in all cases.

- Parent is currently unemployed. Date employment ended: _____. Attach documentation of severance and/or unemployment benefits as well as most recent pay stubs for each parent.
- Untaxed income or benefits received have ended. Date of termination: _____. Attach documentation from the agency providing the benefits.
- Extraordinary unreimbursed medical and/or dental expenses. Attach a detailed letter and supporting documentation of the expenses.
Amount for 2019 calendar year: _____. Amount for 2020 calendar year: _____.
Amount for 2021 calendar year (year to date): _____.
- One-time capital gain or distribution. Please attach a letter explaining the circumstances that resulted in the capital gain/distribution. Please note that both the circumstances and the capital gain/distribution are **one-time** occurrences, which did not occur in 2018, and are not expected again in 2020.
- Death of a parent. Date: _____. Attach documentation of any death benefits received.
- Other. If none of the above categories describe your family's situation, attach an explanation of your circumstances with as much detail and documentation as possible. If your situation involves a change in income, complete the Projected Income Section on the reverse side of this form.

It is the family's responsibility to notify our office if any of the above information should change. This notification should occur within two weeks of any change.

Once we review your appeal and determine whether an adjustment can be made, we will notify you of the outcome in writing. If changes are made to your financial aid package, you will also receive a revised award notification. Response time will vary based on our volume of appeals at the time your request is received, but you can expect a response within ten business days. If you have questions, contact the Office of Student Services at 1-800-294-0294.

Appeal letters, supporting documentation, and income tax information should be sent to www.bc.edu/finaidupload. Detailed instructions, including file limitations, are available under the "Applying for Aid" tab at www.bc.edu/undergradaid. Please note that it takes 48–72 hours for your documents to be added to your financial aid file.

Be sure to write the student's Eagle ID number on the top of each document.

Projected 2021 Income

- Complete this section if you are appealing based on a loss of employment or any other income-related change.
- Be certain that you provide information for all categories of income, not just the types of income that have changed.
- Attach any documentation you have for your figures, such as your most recent pay stubs, a letter from your employer regarding severance package terms, unemployment benefit statement, etc.
- **Actual income figures will be verified and 2021 tax returns will be required by February 15, 2022 in order to verify the information used in the appeal.** If changes were made to your financial aid based on your projections and the actual figures are higher than your projections, aid will be adjusted, and you may be required to repay financial aid received.
- Enter “o” if no income of a certain type is expected.

Estimated 2021 Taxable Income
(1/1/21 to 12/31/21)

Estimated 2021 Income

Office Use Only:
Total 2021/Verified Inc

| | |
|---|----------|
| 1. Father's/stepfather's 2021 work income | \$ _____ |
| 2. Mother's/stepmother's 2021 work income | \$ _____ |
| 3. Severance compensation | \$ _____ |
| 4. Unemployment compensation | \$ _____ |
| 5. Interest and dividend income | \$ _____ |
| 6. Business or real estate income/loss | \$ _____ |
| 7. Taxable IRA/pension/annuity distribution | \$ _____ |
| 8. Other taxable income (such as state tax refunds, alimony, capital gain, taxable social security, etc.) | \$ _____ |
| Total income from numbers 1 through 8 above | \$ _____ |
| Estimated 2021 Net Federal Tax Liability | \$ _____ |

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|----------|
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |
| \$ _____ |

Estimated 2021 Untaxed Income

| | | | |
|---|----------|--------------------------------------|----------|
| Untaxed Social Security Benefits | \$ _____ | Earned Income Credit | \$ _____ |
| Child support received for all children | \$ _____ | AFDC/ADC or TANF | \$ _____ |
| Alimony received | \$ _____ | Cash/gifts paid on your behalf | \$ _____ |
| Untaxed pension distributions | \$ _____ | Worker's Compensation | \$ _____ |
| Payments to IRA/401k/other plans | \$ _____ | Other untaxed income (specify below) | \$ _____ |
| Tax exempt interest income | \$ _____ | _____ | _____ |
| Education tax credits | \$ _____ | | |

Certification Statement

The information provided on this form is accurate and complete to the best of our knowledge. We have provided our signed 2019 and 2020 federal tax returns, including all schedules and W-2 statements. We understand that completing this form does not guarantee financial aid will be increased. We also understand that if our financial aid award is revised based on using our projected income for 2021, we will be required to provide documentation of that income by February 15, 2022. If that documentation changes the projected income used, we understand the financial aid award will be adjusted. Additionally, we understand that our projected year income will be used each year when determining eligibility for financial aid. We also agree to notify the Office of Student Services if our income changes.

Student's Signature _____ Date _____

Parent's Signature _____ Date _____