

2023-2024 Income Appeal

A. Student Information

_____	_____	_____	_____
First Name	M.I.	Last Name	Student ID # (DO NOT INCLUDE SSN)
_____			_____
Phone Number (include area code) or Email			Date of Birth

B. Reason for Appeal

2023-2024 financial aid is based on income from 2021. If 2021 does not accurately reflect your current situation due to **unusual circumstances** you can appeal to use your projected income to determine financial aid eligibility.

You may only appeal circumstances that were **outside of your control**. A choice that reduced your income is not a reason to appeal. Examples of this are choosing to change jobs, quitting a job to return to school, changing employment because you moved to a new city, commission based jobs where income naturally changes, etc. Appeals with these or similar reasons will be automatically denied.

Select any reason that applies to your income appeal from below. You may choose more than one:

- | | | |
|---|---|--|
| <input type="checkbox"/> Income Reduction | <input type="checkbox"/> Loss of Employment | <input type="checkbox"/> Medical Expenses/Disability |
| <input type="checkbox"/> Divorce/Separation | <input type="checkbox"/> Death | <input type="checkbox"/> Debts |
| <input type="checkbox"/> Other: _____ | | |

C. Appeal Steps

1. **Required:** Attach a letter describing your reason(s) for requesting that we use your projected income. Make sure to be specific and include all relevant dates.
2. **Required:** Provide copies of most recent pay stubs listing year-to-date income from all jobs worked. Also provide documentation supporting your reason for appealing.
3. **Required:** Documentation of non-taxable income such as: child support, social security, unemployment, etc.
4. **Required:** You must submit a copy of your most recent Federal income tax return and W-2s.
5. **Required:** Students must complete verification before an appeal is considered. Please see page 2 for required items that must be submitted prior to appeal consideration

Please contact the office of Financial Aid with any questions:

Iowa Western Financial Aid | Clark Hall | 2700 College Road | Council Bluffs, IA 51503
FinancialAid@iwcc.edu | 800.432.5852 or 712.325.3277 | Fax 712.388.6803 | iwcc.edu

D. Verification Items

To ensure the correct figures are being used, any student requesting an income appeal must complete verification by submitting the items below:

- Verification Worksheet (this can be found on the IWCC Financial Aid webpage)
- Student 2021 W-2s
- Student 2021 Federal Tax Return Signed by Student

If you are a dependent student we also need:

- Parent 2021 W-2s
- Parent 2021 Federal Tax Return Signed by Parent

If you are an independent student who is married we also need:

- Spouse 2021 W-2s
- Spouse 2021 Federal Tax Return Signed by Spouse (If Filed Separately From Student)

To submit tax information:

- **(Preferred Method)** Log back into your FAFSA and use the IRS data retrieval tool to link your taxes to your FAFSA. If you use this method make sure to resubmit the FAFSA so we receive the updated version.
- All Tax Returns must be signed by the tax payer
- Make sure to include any schedules that apply to your income
- If you no longer have a copy of your tax return you may order a Tax Return Transcript from the IRS online at www.irs.gov or call 800-908-9946 to request a transcript and they will be mailed to you in 5-10 business days.

E. Disclosure

I understand that submitting this Income Appeal may or may not result in a change of the types or amounts of financial aid I may receive. I also understand that this request is subject to the professional judgment of the Office of Financial Aid at Iowa Western and that any decision is final. I understand that this information will be reviewed and I may be asked to provide additional documentation or clarification pertaining to my situation.

F. Projected 2023 or 2024 Income (Circle One)*

If appealing during Fall 2023 semester use 2023 income. If appealing during Spring/Summer 2024 use 2024 income.

Student Income:

- A. Student's estimated earnings:
 - January 1 to now \$ _____
 - Now to December 31 \$ _____

- B. Spouse's estimated earnings:
 - January 1 to now \$ _____
 - Now to December 31 \$ _____

- C. Other taxable income (include alimony, social security, rent, pensions, etc.) \$ _____/year

- D. Unemployment Compensation \$ _____/year

- E. Non-taxable income (include welfare, child support, IRAS, Social security, etc.) \$ _____/year

Parent Income (for dependent students only):

- A. Parent 1/Mother/Father/Stepparent estimated earnings:
 - January 1 to now \$ _____
 - Now to December 31 \$ _____

- B. Parent 2/Mother/Father/Stepparent estimated earnings:
 - January 1 to now \$ _____
 - Now to December 31 \$ _____

- C. Other taxable income (include alimony, social security, rent, pensions, etc.) \$ _____/year

- D. Unemployment Compensation \$ _____/year

- E. Non-taxable income (include welfare, child support, IRAS, Social security, etc.) \$ _____/year

G. Certification and Signature

By signing this form I certify under penalty of perjury, that all the information reported to qualify for federal student assistance is complete and accurate. If I give false or misleading information on this worksheet, I may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature (Dependent Student)

Date

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