



Student ID #: \_\_\_\_\_ Name: \_\_\_\_\_
LAST FIRST M.I.

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_ @stthom.edu

Professional Judgment, or referred to as 'Special Circumstance' by the Department of Education, is a process that enables the Financial Aid Office to recalculate a student's family income, student budget, or Cost of Attendance, in order to increase the student's eligibility for federal or state aid.

REQUIRED DOCUMENTATION

The request for professional judgment will be processed after all required documentation is received. The counselor processing the request may ask for supplemental information for clarification.

- Student Statement explaining the circumstances
\*Supporting Documentation as listed in the section, based on the special circumstance
Verification Worksheet (Dependent Form / Independent Form)
Student IRS Tax Return Transcript and W2's
Parents' IRS Tax Return Transcript and W2's (Dependent Student)
Spouse's IRS Tax Return Transcript and W's (Independent)

\*SPECIAL CIRCUMSTANCE

Circumstances eligible for professional judgment are limited to the options listed on this form. Select the type circumstance and the current situation for professional judgment review.

Table with 2 columns: LOSS OF INCOME and REQUIRED DOCUMENTATION. Rows include Loss of Employment/ Retirement, Reduction of earned wages, Disability, Death of a Parent/ Spouse, Divorce or Separation, and Ended/Reduced Child Support.

Table with 2 columns: COST OF ATTENDANCE INCREASE and REQUIRED DOCUMENTATION. Rows include Dependency Care and Computer/Laptop Purchase.

CONTINUED....

ID:



## SPECIAL CIRCUMSTANCE - continued

### PROVISIONALLY INDEPENDENT / DEPENDENCY OVERRIDE

#### REQUIRED DOCUMENTATION

- Typed personal statement explaining your unusual circumstances.
- Three statements from professionals familiar with your situation that further outlines and verifies the special circumstances. (Professional: teacher, counselor, clergy, social worker, spiritual leader, etc.)

### PRIVATE K-12 TUTION EXPENSE of a Sibling or Other Household Member

#### REQUIRED DOCUMENTATION

Tuition statement or receipts of tuition paid towards private K-12 from the current or previous year for the students sibling or other household member that is not the UST student.

### UNUSUALLY HIGH UNINSURED/UNREIMBURSED Medical/Optical/Dental Expenses

#### REQUIRED DOCUMENTATION

Provide receipts or account statements from the medical facility showing **amounts paid**.

Amounts paid that is over 11% of the family Adjusted Gross Income will be considered.

Please Note: *Bills only showing the outstanding balance will not be used.*

*Bills showing an outstanding balance with handwritten notes about payment will not be used.*

### ONE TIME LUMP SUM INCOME

### REQUIRED DOCUMENTATION

Withdrawal from a Retirement Fund	-Statement from financial institution showing distribution details -Statement from financial institution showing amount rolled over in to a new/different retirement account
Sale of a Home or Property	Documentation of the home/property sale with amount
Sale of Stock or Other Securities	Statement from financial institution showing distribution amount
Inheritance	Documentation showing amount inherited.

**Additional Information Required:** Receipt(s) showing how this income was spent

*Examples of how funds were spent:* Roll over to new/different retirement account

*Purchase of a home or vehicle/ Mortgage payoff*

*Home/ Business repair expenses*

### OTHER UNUSUAL CIRCUMSTANCE

Circumstances that affect the family income, not related to medical expenses, that occurred after 2024.

Provide receipts or account statements from institutions/business providing the service showing amounts paid.

- Examples of unusual financial circumstances:
- Funeral Expenses (including travel)
  - Adoption Expenses (including Travel)
  - Repair Costs due a Natural Disaster or Emergency
  - Moving Expenses related relocation
  - Siblings/Other Children in College
  - Legal fees

Please Note: *Bills only showing the outstanding balance will not be used.*

*Bills showing an outstanding balance with handwritten notes about payment will not be used.*



## CERTIFICATION AND SIGNATURES

Dependent student must provide a parent signature.

I/We certify that the information and documentation provided is accurate and complete to the best of my/our knowledge. I/We understand that if the requested information or documentation is not provided, the professional judgment request will be denied without further review.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

State law requires that you be informed of the following: (1) with few exceptions, you are entitled on request to be informed about the information the University collects about you by use of this form; (2) under sections 552.021 and 552.023 of the Government Code, you are entitled to receive and review the information; and (3) under section 559.004 of the Government Code, you are entitle to have the University correct information about you that is incorrect