



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. Recalculating this information will require documentation that will be listed below.



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.

LOSS OF INCOME

REQUIRED DOCUMENTATION

Loss of Employment/ Retirement	Letter from former employer stating last day of work 3 recent pay stubs of Parent/Spouse that is employed
Reduction of earned wages	Letter from employer stating the change and when it took effect 3 recent pay stubs reflecting the reduction 3 recent pay stubs of other Parent/Spouse
Disability	Disability Letter and Statement indicating benefit amounts 3 recent pay stubs from Parent/Spouse that is employed
Death of a Parent/ Spouse	Copy of Death Certificate or funeral announcement 3 recent pay stubs of surviving Parent/Spouse that is employed
Divorce or Separation	Divorce: Copy of Final Divorce Decree Separation: Legal separation documents, or <u>utility bills</u> with different addresses 3 recent pay stubs of student or custodial parent
Ended/Reduced Child Support	Documentation indicating terms of the child support (includes the name of the child, amount, and when the support ends) Documentation indicating amount of child support for any other child in which support is still being received.

COST OF ATTENDANCE INCREASE

REQUIRED DOCUMENTATION

Dependency Care	Recent account statement from the dependency care facility or daycare showing amounts paid and name of the dependent
Computer/Laptop Purchase	Recent receipt of computer/laptop purchased or details of the computer/ laptop to be purchased showing cost.

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 TUITION 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:

Examples of how funds were spent:

Receipt(s) showing how this income was 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 entitled to have the University correct information about you that is incorrect

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