

MTI PROFESSIONAL JUDGMENT REQUEST FORM

INSTRUCTIONS

When you filed the Free Application for Federal Student Aid (FAFSA), you had to provide household income information from the previous calendar year, as well as household asset information at the time of application. Your household's financial ability to contribute to your cost of education ("Expected Family Contribution") was calculated by federal processors using a standard federal formula.

If you have an unusual situation where significant and documented circumstances exist that have a direct impact on your household's ability to financially contribute to your educational expenses (i.e. lay off), the law gives financial aid professionals the ability to use professional judgment when evaluating your financial need. In order to assist you in this manner, it is necessary for you to submit a clear and accurate signed statement detailing those circumstances and supporting documentation. Professional judgment decisions are school-specific, apply to only one academic year, and are final (**no appeal process**).

The following items are examples of circumstances that may be considered:

*Loss or change in employment *Loss of income/benefits *Retirement Benefits *Legal Settlement/Funds *K-12 tuition **paid** for *Divorce or legal separation from spouse *Significant medical expenses *Death of spouse **or** parent used on associated expenses **paid** out-of-pocket during the year in question

IN ORDER FOR YOUR REQUEST TO BE PROCESSED, COMPLETE ALL OF THE FOLLOWING:

1. **Fill out a Professional Judgment Request Form (reverse) and attach a signed, detailed statement about the change in your financial situation (how your current financial situation is significantly different than what was reflected on your FAFSA).** Make sure that you explain the reasons surrounding the situation. Include exact dates that the condition started, ended and/or changed. It is important that your situation be clearly explained and that your statement is organized, detailed, and well documented.
2. **Attach documentation** that substantiates the circumstances you have described. Be sure it shows key date(s) and amount(s), and clearly establishes any pattern or basis for projection. *Please understand that this is not an appeal based on need or merit, but a statement of the facts.*
3. **Include a copy of the tax return your FAFSA application was based on and the Verification Worksheet (use Dependent Verification if parent's information was required on the FAFSA and Independent if it was not.)**

EXAMPLES OF ACCEPTABLE DOCUMENTATION INCLUDE:

- ***Claim Summary, Payment/Epay List and Wages List** from the Unemployment Department
- *Copy of legal separation papers or divorce decree
- *Layoff notices or agency documentation regarding income or benefit loss
- *Doctor/hospital statements; copy of death certificate; obituary or funeral notice
- ***Paid** K-12 private school tuition receipts
- ***Paid** medical bill receipts

If you have applied to a program at MTI you may submit your completed request to:

Main Campus Students:

MTI Financial Aid Office at: 5603 34th Street West; Bradenton, FL 34207

East Campus Students:

MTI Financial Aid Office at: 5520 Lakewood Ranch Boulevard; Bradenton, FL 34211

MTI PROFESSIONAL JUDGMENT REQUEST FORM

Last Name	First Name	MI	
Social	Program	Start Date	Phone Number
Street Address	City	State	Zip Code

Please select and complete one or more of the following Categories, as applicable, provide the required signatures at the bottom, and submit this form with your signed statement and required documentation.

A. INCOME / BENEFITS (see examples under Category A on reverse):

If your household income for the current school year has significantly changed since the previous tax year and/or the income you reported on your FAFSA is no longer an accurate measure of your expected family contribution for the current academic year, then provide income information below, as applicable:

A change in financial resources as occurred between year _____ and year _____. Fill in below your expected income for the remainder of the year and the income prior to the change.

	<u>--Dependent Students Only--</u>			
	Student	Spouse	Father/Step	Mother/Step
1. Income from work (wages, salary, tips)	\$ _____	\$ _____	\$ _____	\$ _____
2. Interest/Dividend Income	\$ _____	\$ _____	\$ _____	\$ _____
3. Child Support	\$ _____	\$ _____	\$ _____	\$ _____
4. Unemployment	\$ _____	\$ _____	\$ _____	\$ _____
5. Workers Compensation	\$ _____	\$ _____	\$ _____	\$ _____
6. AFDC/ADC/TANF	\$ _____	\$ _____	\$ _____	\$ _____
7. Social Security Benefits	\$ _____	\$ _____	\$ _____	\$ _____
8. Other Income (Taxable and Untaxed)	\$ _____	\$ _____	\$ _____	\$ _____

B. ASSETS:

If the assets you reported on your FAFSA were a one-time payment/benefit and do not accurately represent a current resource, please indicate the nature of those assets, how used, and attach documentation:

- _____ A) proceeds from the sale of my primary residence that were recently used to purchase a new home, in which I/my household reside.
- _____ B) proceeds from a legal settlement that were recently used to pay off associated expenses.
- _____ C) 401K/Retirement or Pension Benefits
- _____ D) other, please list: _____

C. PAID QUALIFIED EXPENSES:

If you/your household *paid* K-12 private school tuition or medical bills during the previous year, please provide a signed statement detailing how much was paid, by whom, for whom, when, and for what. Be sure to attach documentation.

CERTIFICATION(s):

“I certify that the information provided on this request is true and complete to the best of my knowledge and represents the most accurate description of my/my household’s current ability to contribute to my educational expenses.” WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

X		X	
Student Signature	Date	Spouse or Parent Signature	Date