



2024-2025 Financial Aid Professional Judgment Checklist

Please indicate the circumstance that applies to you and your family:

- Special Circumstance** refers to financial situations (e.g., loss of a job, separation, divorce, death, excessive medical expenses, etc.) that may justify a review of your FAFSA results and aid eligibility.
- Unusual Circumstance** refers to a unique situation (e.g., parental abandonment or abuse, no parental contact, incarceration, etc.) that may justify a change in a student's dependency status.

Professional Judgment (PJ) requests should be submitted with **ALL** required supporting documentation. A review of your situation cannot be made if required documents are missing and/or incomplete. Professional Judgment will be reviewed on a case-by-case basis. Once a decision has been made you will be notified via your school email.

Ways to submit your request and documentation:

1. Hand deliver your completed Professional Judgment checklist along with all the required supporting documents to the Student Financial Services Office. *Please do not email sensitive information.*
2. Upload your forms and documents by logging on to your student portal. Click on **My Documents**, then **Document Center**. Scroll down to the Upload **Document** section. Select the required document, then choose your file to upload.

Last Name	First Name	M.I.	Social Security Number/Student ID#
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Address (include apt. #)	City	State	Zip Code
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Date of Birth	Lindenwood E-mail Address	Phone Number (include area code)
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Special Circumstance	Required Documents
<input type="checkbox"/> Death of a Parent or Spouse	<input type="checkbox"/> Copy of the surviving spouse or parent's 2022 W2s or 2022 IRS wage and income transcript. <input type="checkbox"/> Copy of death certificate or obituary (parent/ spouse).



<input type="checkbox"/> Loss of Employment/Reduction of Income	<ul style="list-style-type: none"> <input type="checkbox"/> Documentation of termination of employment from former employer. <input type="checkbox"/> Copy of 2022 and 2023 IRS Federal Tax Return (student/parent/spouse) and copy of 2022 and 2023 W2 or IRS wage and income transcript. <input type="checkbox"/> Most recent check stub of student/parent/spouse. <input type="checkbox"/> Itemized list of unemployment wages received. <input type="checkbox"/> Copy of severance package.
<input type="checkbox"/> Divorce or Separation	<ul style="list-style-type: none"> <input type="checkbox"/> Copy of 2022 and 2023 IRS Federal Tax Return (student/parent/spouse). <input type="checkbox"/> Copy of 2022 and 2023 W2's or IRS wage and income transcript. <input type="checkbox"/> Copy of divorce decree <u>or</u> legal separation documents <input type="checkbox"/> Documentation from an attorney.
<input type="checkbox"/> Excessive Out-of-Pocket Medical Expenses	<ul style="list-style-type: none"> <input type="checkbox"/> Copy of 2022 and 2023 IRS Federal Tax Return (student/parent/spouse) or IRS wage and income tax transcript. <input type="checkbox"/> Copy of itemized receipts or statements for excessive out-of-pocket medical expenses paid by the student/parent/spouse. This should not include any portion covered by a third party such as your health insurance.
Unusual Circumstance	Required Documents
<input type="checkbox"/> Dependency Override	<ul style="list-style-type: none"> <input type="checkbox"/> A letter from the student explaining your unusual circumstance. <input type="checkbox"/> One letter from a professional such as a teacher, counselor, clergy, physician, etc. who are aware of your unusual circumstance. Include the relationship to the student including contact information. <input type="checkbox"/> One letter from a member of your family validating your unusual circumstance. Include the relationship to the student including contact information.