



### 2025-2026 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 or have not been submitted within 30 days. 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.

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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 <u>or</u> parent’s 2023 W2s or 2023 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"><li><input type="checkbox"/> Documentation of termination of employment from former employer.</li><li><input type="checkbox"/> Copy of 2023 and 2024 IRS Federal Tax Return (student/parent/spouse) and copy of 2023 and 2024 W2 or IRS wage and income transcript.</li><li><input type="checkbox"/> Most recent check stub of student/parent/spouse.</li><li><input type="checkbox"/> Itemized list of unemployment wages received.</li><li><input type="checkbox"/> Copy of severance package.</li></ul>
<input type="checkbox"/> Divorce or Separation	<ul style="list-style-type: none"><li><input type="checkbox"/> Copy of 2023 and 2024 IRS Federal Tax Return (student/parent/spouse).</li><li><input type="checkbox"/> Copy of 2023 <u>and</u> 2024 W2's or IRS wage and income transcript.</li><li><input type="checkbox"/> Copy of divorce decree <u>or</u> legal separation documents</li><li><input type="checkbox"/> Documentation from an attorney.</li></ul>
<input type="checkbox"/> Excessive Out-of-Pocket Medical Expenses	<ul style="list-style-type: none"><li><input type="checkbox"/> Copy of 2023 and 2024 IRS Federal Tax Return (student/parent/spouse) or IRS wage and income tax transcript.</li><li><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.</li></ul>
Unusual Circumstance	Required Documents
<input type="checkbox"/> Dependency Override	<ul style="list-style-type: none"><li><input type="checkbox"/> A letter from the student explaining your unusual circumstance.</li><li><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.</li><li><input type="checkbox"/> One letter from a member of your family validating your unusual circumstance. Include the relationship to the student including contact information.</li></ul>