



# New Student Financial Aid Appeal Questionnaire 2024-25

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Submit All Documents To:

Financial Aid Office  
Illinois Wesleyan University  
PO Box 2900  
Bloomington, IL 61702  
P (309) 556-3096 F (309) 556-3833

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2023	2024		2023	2024
_____	_____	a. Education credits (Hope and Learning tax credits) from IRS form 1040 schedule 3 line 3.	_____	_____
_____	_____	b. Child Support paid because of divorce decree or separation due to legal requirements.	_____	_____
_____	_____	c. Taxable earnings from need-based employment programs such as Work Study and need-based portions of fellowships, and/or assistantships.	_____	_____
_____	_____	d. Grant and scholarship aid reported as taxable income in the Adjusted Gross Income includes AmeriCorps benefits, fellowship, and assistantships funds.	_____	_____
_____	_____	e. Combat pay or special combat pay. Do not enter untaxed combat pay portions	_____	_____
_____	_____	Totals for Question 6	Totals for Question 17	_____

The IWU Financial Aid Application and Free Application for Federal Student Aid (FAFSA) may not reflect your unusual financial circumstances

## Appeal Instructions

Please use these instructions to complete the Appeal Questionnaire. The appeal must be signed by the student and custodial parent. The 2023 IRS lines are provided as a guide to estimate future or current income figures in the event that more recent tax return information is unavailable. We would encourage you to use your most recent tax return information to answer each question where possible.

1. Report or Estimate the Parent(s)' AGI. 2023 IRS Form:  
-1040 line 11  
\*\*Do not include non-custodial parent income\*\*
2. Report or Estimate the Parent(s)' Income Tax Paid. 2023 IRS Form: 1040 line 22  
\*\*Do not include FICA, Self-Employment, or other taxes\*\*
3. Report or Estimate Parent Wages. 2023 IRS Form:  
-1040 line 1  
\*\*If you own a business or farm, also add lines 3 and 6 from Schedule 1. \*\*
4. Refer to question 3 instructions.
5. Self-Explanatory.
6. Complete Parent Additional Financial Information on page 2.
7. Complete Parent Untaxed Income Information on page 2.
8. Non-custodial parent refers to a biological parent not living in the household.
9. Self-Explanatory.
10. Investments include real estate (other than your home), trust funds, money market funds, mutual funds, CD's, stocks, bonds, installment and land sale contracts (including mortgages held), and other securities. Investment value includes the market value of these investments. Do not include the value of life insurance and qualified retirement accounts. Investment debt refers to the amount of debt related to the investment.
11. These figures should include all out of pocket payments (such as co-pays and other payments) made after insurance, flex spending, and/or health savings account payments. Documentation supporting the total amount paid for medical expenses is required. Examples of documentation would include (but limited to): account summaries, receipts, canceled checks, Schedule A (if you itemized medical expenses as part of your tax return), and any other documentation that showing payments made.
12. The answer must be completed as of the day you complete the questionnaire. Do not include qualified retirement accounts.
13. In general, a person may be considered a dislocated worker if they are receiving or did receive Unemployment Compensation benefits due to being laid off or loss of a job and are unlikely to be returning to the job, was self-employed but due to economic conditions or natural disaster is now unemployed, a displaced homemaker, or a spouse of an Armed Forces member on active duty who lost a job due to being relocated due to change in duty station.
14. Report or Estimate the Student's AGI. 2023 IRS Form: -1040 line 11
15. Report or Estimate the Student's Income Tax Paid. 2023 IRS Form: 1040 line 22  
\*\*Do not include FICA, Self-Employment, or other taxes\*\*
16. Report or Estimate Student's wages. 2023 IRS Form:  
-1040 line 1
17. Complete Student Additional Financial Information on page 2.
18. Complete Student Untaxed Income Information on page 2.

## Policies and Adjustments

### Policy

To qualify for most financial aid programs, a family must demonstrate 'financial need.' Financial need is the difference between the cost of your education and the amount you and your family are expected to contribute to your education, as determined by the Financial Aid Office from the information you supply when you apply for financial aid.

The basis of the calculation is a combination of the federal formula called "Federal Methodology" and "Institutional Methodology." The formulas consider both the income and assets of the family. The data needed for the analysis is collected from the Free Application for Federal Student Aid (FAFSA) and the IWU Financial Aid Application or the CSS PROFILE. The Financial Aid Office determines the accuracy and reasonableness of the data by comparing it to the tax return information. Separate contributions toward the cost of education are calculated for the student and the parents. The two combined contributions constitute the expected family contribution.

An appeal is a request for a re-evaluation of your financial aid eligibility due to changes in your situation from the time you applied for financial aid. When considering your appeal, the Financial Aid Office takes into account the availability of funds, the timeliness of your original application for financial aid, the timeliness of your appeal, and the nature of the change in circumstances. Appeal decisions are subject to Federal, State, and University regulations.

### Funding and Financial Aid Adjustments

Due to limited availability of assistance, approved appeals may be funded with IWU, State, and/or Federal grants in addition to student loans. Regardless of circumstances, additional awards may be provided only if money is available at the time your appeal is reviewed.

### How to Appeal the Family Contribution

You may complete the enclosed questionnaire including an appeal letter which details your change in circumstances. Please also include any supporting documentation with this form and return the requested information to the IWU Financial Aid Office.