

**IMPORTANT: You should only submit this form if you meet the Special Circumstance listed above. You will need to submit all of the documentation listed under the Required Documentation box (next page) in order for Westfield State University (WSU) to process your request.**

**A. Student's Information**

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Student's Last Name   Student's First Name   Student's M.I.   CWID

**B. Instructions:**

Before petitioning for a Special Circumstance, a completed 2020-2021 Free Application for Federal Student Aid (FAFSA) must be on file with the Financial Aid Office at WSU.

Incoming students will not be evaluated for a Special Circumstance until their initial financial aid has been processed.

Returning students can begin to submit their information March 1<sup>st</sup> of the year for which they will be applying for aid.

In addition to submitting the information for the chosen Special Circumstance category, the Federal government requires that we verify the data you provided on your FAFSA. Therefore, all students are required to submit the following documents:

- If the student, spouse (if applicable), or parent filed a 2018 Federal Tax Return, attach a signed copy of the 2018 Federal Return with Schedules 1, 2 and 3 if applicable.
- If the parent or Independent student did not file a 2018 Federal Tax Return, a Verification of Non-Filer must be attached. A Verification of Non-Filer can be requested by mail using IRS Form 4506-T.
- All students must complete a Verification Worksheet. These forms are located on our website. Please copy and paste the following link on your browser to access the forms:

<http://www.westfield.ma.edu/tuition-financial-aid/verification-forms>

- A personal statement from the student/parent detailing the circumstance. Please be specific.

**You must submit this form ALONG WITH all the required documentation. Incomplete submissions will not be evaluated. Please call us at (413) 572-5218, Option #2 with any questions.**

# Retirement

Student's name: \_\_\_\_\_ CWID: \_\_\_\_\_

## C. Special Circumstance Certification:

Select the calendar year in which the Special Circumstance occurred: 2018: \_\_\_\_ 2019: \_\_\_\_ 2020: \_\_\_\_

Review and complete the information below.

Circumstance	Reason	Required Documentation
Retirement	Retired in 2018 or later	<ul style="list-style-type: none"> <li>Last pay stub with year-to-date earnings</li> <li>Benefits statement from Social Security Administration, or pension agency</li> <li>Severance pay notice, if applicable</li> </ul>

In addition to the required documentation, please complete the following information:

Name of retired person: \_\_\_\_\_

Date of retirement: \_\_\_\_\_

Date retirement benefits began: \_\_\_\_\_

Monthly amount of benefits: \$ \_\_\_\_\_

Is the person receiving/received severance pay: YES \_\_\_\_\_ NO \_\_\_\_\_

If YES lump sum amount: \$ \_\_\_\_\_ or weekly gross \$ \_\_\_\_\_

What dates did the severance begin: \_\_\_\_\_ end: \_\_\_\_\_

## D. Certification and Signature

By signing this worksheet I certify that all of the information reported on it is complete and correct.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

**STOP! You must submit this form ALONG WITH all of the required documentation. Incomplete submissions will not be evaluated. Information can be submitted via e-mail, fax or USPS mail. We suggest you put your name and CWID on all submitted documents.**

Email: [financialaid@westfield.ma.edu](mailto:financialaid@westfield.ma.edu)

Fax: (413) 579-3019