



# BEAUFORT

COUNTY COMMUNITY COLLEGE  
Office of Financial Aid

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Washington, NC 27889  
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**2023-2024  
Professional Judgement**

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

In cases where 2023-2024 family income is expected to be substantially less than income reported on the 2021 tax returns, or if you have special circumstances we should take under advisement, you may request a review of family contribution and financial eligibility. Your family situation should meet one of the criteria used by Beaufort County Community College to determine special circumstances. Complete and return this form to the Financial Aid Office along with documentation to support your request. ***The decision reached regarding your Professional Judgement request by Beaufort County Community College Financial Aid Office is final and cannot be appealed. A notification will be sent via your BCCC student email account.***

## PART I: Instructions for Completion

- Submit a copy of IRS tax return transcripts from the 2021 and 2022 tax year (including W-2s), all current year-to-date earnings and any benefit documentation for the student, spouse, and/or parent(s) if applicable. If the student, spouse or parent(s) filed separately, the student must provide all IRS tax transcripts.
- Provide a typed, signed and detailed statement explaining the circumstances including how the student and/or student family's financial status has changed.
- Complete only the sections that apply to your situation and provide ALL required documentation.
- Provide all requested signatures. Include student name and student ID number on all attached documents.

Incomplete requests will not be considered; if additional information is required, you will be notified promptly

**To ensure a more accurate income adjustment for those who have lost employment, please wait at least 90 days after the change has occurred to submit a request for review of special conditions criteria for Part IV sections A and B. If this occurs after the beginning of the fall semester, please wait to submit this judgment after you complete your taxes for the 2022 year.**

## PART II: Household Members and Relationship

Please list all household members, including yourself as defined on the FAFSA. Independent students: include spouse and dependent children. Dependent students include: parent(s), and dependent children included in the parents' household. ***If a listed family member will be attending college at least half-time for the 2023-2024 school year, please also include the name of institution.***

| Household Member Name | Age | Relationship | Name of College Attending for 2023-2024 at least half-time |
|-----------------------|-----|--------------|--|
|                       |     | Self         | Beaufort County Community College                          |
|                       |     |              |  |
|                       |     |              |  |
|                       |     |              |  |

**PART III: Explanation of Situation**

Please check one box that corresponds to your situation:

| SITUATION  | DOCUMENTATION REQUIRED   |
|--|--|
| <input type="checkbox"/> Death of Parent/Spouse  | <ul style="list-style-type: none"> <li>• Photocopy of death certificate and/or obituary</li> </ul>   |
| <input type="checkbox"/> Disability or Natural Disaster  | <ul style="list-style-type: none"> <li>• Date disability or natural disaster occurred</li> <li>• Proof of disability (medical documentation, letter from vocational rehabilitation, etc.)</li> <li>• Current year-to-date pay stubs from all jobs held</li> <li>• Proof of disability income</li> </ul>  |
| <input type="checkbox"/> Divorce or Separation   | <ul style="list-style-type: none"> <li>• Divorce decree/separation papers or proof of separate living accommodations</li> <li>• Tax Return Transcript and Wage &amp; Income Transcript</li> </ul>  |
| <input type="checkbox"/> Elementary/Secondary Tuition  | <ul style="list-style-type: none"> <li>• Paid invoice</li> <li>• Letter certifying enrollment from school</li> </ul>   |
| <input type="checkbox"/> Loss of Employment/Income for Student, Spouse or Parent (loss of employment should occur 12 weeks prior to request) | <ul style="list-style-type: none"> <li>• Termination letter/severance letter from employer with last date of employment</li> <li>• Most recent pay stubs or statement of earnings to date</li> <li>• Statement of benefits</li> <li>• Other applicable documentation to verify loss of other income</li> <li>• Tax Return Transcript and Wage &amp; Income Transcript</li> </ul> |
| <input type="checkbox"/> Medical expenses (only applies if you filed a 1040 Schedule A)  | <ul style="list-style-type: none"> <li>• Federal 1040 income tax return form including</li> <li>• Schedule A</li> </ul>  |
| <input type="checkbox"/> Retirement  | <ul style="list-style-type: none"> <li>• Letter of separation from employer</li> <li>• Last pay stub showing earnings</li> <li>• Statement of Retirements benefits</li> </ul>  |
| <input type="checkbox"/> Other   | <ul style="list-style-type: none"> <li>• Provide all supporting documentation</li> </ul>   |

**PART IV: Explanation of Circumstances and Additional Required Documents**

**A) Student, Spouse or Parental total loss employment for more than 90 consecutive days** – This must be a complete loss of employment.

Check only one box that corresponds to your situation and provide the documentation listed where applicable.

Termination or cessation of employment for \_\_\_\_\_ weeks

**Required documentation of termination or cessation of employment:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Employer’s notice and/or written documentation of termination/cessation
- Most recent pay stubs or statement of earnings to date for all employment for all parties
- Notice of application for unemployment compensation and amount received
- Documentation of all other sources of income for all parties (taxable and non-taxable)
- Attending Doctor’s statement of disability
- Notification of Worker’s Compensation
- Documentation of employer disability payments

**Name of person who is unemployed:** \_\_\_\_\_

If not the student, please list the relationship: \_\_\_\_\_

Disability or natural disaster; unable to earn money for \_\_\_\_\_ weeks

**Required documentation of disability or natural disaster:**

2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)

- Attending Doctor's statement of disability
- Documentation of date disability or natural disaster resulted in termination of employment
- Documentation of employer disability payments
- Notification of Worker's Compensation
- Documentation of Official Declaration of Natural Disaster
- Most recent pay stubs or statement of earnings to date for all employment of all parties
- Documentation of all other sources of all parties' income (taxable and non-taxable)

**B) Student, Spouse or Parental loss of untaxed income or benefit for more than 90 consecutive days** – This must be a complete loss of the benefit. The untaxed income or benefit would have been from a public or private agency, or company, or person because of a court order. Do not include veterans' educational benefits.

**Check only one box that corresponds to your situation and provide the documentation listed where applicable.**

Loss of unemployment compensation for \_\_\_\_\_ weeks

**Required documentation of loss of unemployment compensation benefits:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Notice of application for unemployment compensation and amount received
- Termination Letter including date benefits ceased
- Unemployment insurance benefits
- Most recent pay stubs or statements of earnings to date for all employment for all parties
- Documentation of all other sources of all parties' income (taxable and non-taxable)

Loss of or reduction in Social Security benefits for \_\_\_\_\_ weeks

**Required documentation of loss of social security benefits:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Date benefits ceased
- Documentation from agency providing benefits that states when benefits stopped, and amount received (if any) in the current year
- Most recent pay stubs or statements of earnings to date for all employment for all parties
- Documentation of all other sources of all parties' income (taxable and non-taxable)

Loss of or reduction in Disability benefits for \_\_\_\_\_ weeks

**Required documentation of loss of disability benefits:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Date disability occurred
- Proof of disability (medical documentation, letter from vocational rehabilitation, etc.);
- Current year-to-date pay stubs from all jobs held
- Proof of disability income
- Documentation of all other sources of parent income (taxable and non-taxable)

Loss of or reduction in Welfare benefits for \_\_\_\_\_ weeks

**Required documentation of loss of welfare:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Benefit provider's notification of loss of benefit
- Most recent pay stubs or statements of earnings to date for all employment of all parties
- Documentation of all other sources of parent income (taxable and non-taxable)

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

Loss of or reduction in Court Ordered Child Support for \_\_\_\_\_ weeks

**Required documentation of loss of court ordered child support:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Court documents verifying loss and date/conditions of loss
- Most recent pay stubs or statements of earnings to date for all employment of both parties
- Documentation of all other sources of parent income (taxable and non-taxable)

Other \_\_\_\_\_ for \_\_\_\_\_ weeks

**C) You (the student) have already filed your Free Application for Federal Student Aid (FAFSA or Renewal FAFSA) and, since that time, you or your parents have separated or divorced.**

Please provide the date you or your parents separated or divorced: \_\_\_\_\_  
(MM/DD/YY)

**Required documentation:**

- 2021 and 2022 Tax Returns, including all schedules, and W2s or Wage & Income Statement(s)
- Court documented separation agreement or divorce decree/settlement

**D) You (the student) have already filed your Free Application for Federal Student Aid (FAFSA or Renewal FAFSA) and, since that time, one of your parents (or your spouse) has passed away.**

Please provide the date your parent (or spouse) passed away: \_\_\_\_\_  
(MM/DD/YY)

**Required documentation:**

- All 2021 and 2022 W2 forms for both tax filers and Wage & Income Transcript for surviving tax filer
- Death Certificate
- Student's Birth Certificate (if reporting death of a parent)
- Student's Marriage Certificate (if reporting the death of a spouse)
- Obituary

**PART VI: Projected Income for 2023**

Please provide estimates of income for the following, if applicable. If an item does not apply, write "N/A".

| Income Source            | Student | Spouse, if married | Parent(s), if dependent |
|--------------------------|---------|--------------------|-------------------------|
| Wages & Salaries         | \$      | \$                 | \$                      |
| Unemployment             | \$      | \$                 | \$                      |
| Disability Benefits      | \$      | \$                 | \$                      |
| Social Security Benefits | \$      | \$                 | \$                      |
| Child Support Received   | \$      | \$                 | \$                      |
| Alimony Received         | \$      | \$                 | \$                      |
| Other Untaxed Income     | \$      | \$                 | \$                      |
| Other:                   | \$      | \$                 | \$                      |

Be certain you have completed the following before submitting your appeal to us:

- Provide a typed detailed letter of appeal that explains how your family's financial status has changed and indicate the situation that applies by checking the appropriate box on this form.
- Please complete all sections of this form.
- Attached required documentation.

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

## **PART VII: Certification Statements and Signatures for Corrections**

Each person signing below certifies that all the information reported on this application and any attachments provided is true and complete to the best of my knowledge. I understand that if I purposely give false or misleading information on my Student Aid Report, I may be subject to a \$20,000 fine, a prison sentence, or both. I understand that failure to provide the required documentation may result in denial of this application.

I authorize Beaufort County Community College Financial Aid Office to make corrections to my original and/or subsequent Student Aid Report, if necessary, based on the documentation provided. *If you are a dependent student, it is required that at least one parent sign the form.*

\_\_\_\_\_  
Student Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Required, If Dependent Student)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (Optional)

\_\_\_\_\_  
Date

### **FOR FINANCIAL AID OFFICE USE ONLY**

#### **Professional Judgement Certification**

Approved       Denied

Need Analysis

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_  
COA: \_\_\_\_\_ Initial EFC: \_\_\_\_\_ New EFC: \_\_\_\_\_

|                      | Verified Income | Verified AGI | Verified Taxes Paid | Adjusted Income for PJ | Adjusted AGI for PJ | Adjusted Taxes Paid for PJ |
|----------------------|-----------------|--------------|---------------------|------------------------|---------------------|----------------------------|
| Student Information  | \$              | \$           | \$                  | \$                     | \$                  | \$                         |
| Parental Information | \$              | \$           | \$                  | \$                     | \$                  | \$                         |
| Spouse Information   | \$              | \$           | \$                  | \$                     | \$                  | \$                         |

Reason/Explanation:

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FA Reviewer: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_