2027-2028 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. **Professional Judgement decisions are final, unless new relevant documentation is provided within the award year.**

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.	Student ID#

Address (include apt. #)	City	State	Zip Code

Date of Birth	Lindenwood E-mail Address	Phone Number (include area code)

Special Circumstance	Required Documents
☐ Death of a Parent or Spouse	☐ Copy of the surviving spouse **or** parent's **2025** W2s or **2025** IRS wage and income transcript. ☐ Copy of death certificate or obituary (parent/ spouse).

Lindenwood University Office of Student Financial Services
209 South Kingshighway • St. Charles, MO 63301 • (636) 949-4923 • Fax (636) 949-4109

☐ Loss of Employment/Reduction of Income	☐ Letter explaining the loss of employment or reduction of income. ☐ Documentation of termination of employment from former employer. ☐ Copy of **2025 and 2026** IRS Federal Tax Return (student/parent/spouse) and copy of **2025 and 2026** W2 or IRS wage and income transcript. ☐ Most recent check stub of student/parent/ spouse. ☐ Itemized list of unemployment wages received. ☐ Copy of severance package.
☐ Divorce or Separation	☐ Copy of **2025 and 2026** IRS Federal Tax Return (student/parent/spouse). ☐ Copy of **2025 and 2026** W2's or IRS wage and income transcript. ☐ Copy of divorce decree **or** legal separation documents ☐ Documentation from an attorney.
☐ **Excessive** Out-of-Pocket Medical Expenses Not Covered by Insurance	☐ **Copy** of **2025 and 2026** IRS Federal Tax Return (student/parent/spouse) or IRS wage and income tax transcript. ☐ 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**
☐ Dependency Override situation (e.g., parental abandonment or abuse, no parental contact, incarceration, etc.)	☐ A letter from the student explaining your unusual circumstance. ☐ One letter from a professional such as a teacher, counselor, clergy, physician, etc. **who is aware of your unusual circumstance and will address that in the letter**. Include the relationship to the student and the contact information. ☐ One letter from a member of your family **who is aware of your unusual circumstance and will address that in the letter**. Include the relationship to the student and the contact information.