

2024-2025 Parent Contribution Appeal

A. Student and Parent Information		
Student Name:	7-digit NAU ID Number:	NAU E-mail:
Parent Name:	Parent Phone:	Parent E-mail:

Information for completing the contribution appeal:

- This appeal is only considering circumstances that occurred in the year **2023**.
- **Prior to submission of this form, parent(s) must have filed a 2023 federal tax return (if required to file).**
- This appeal will not be reviewed without supporting documentation.
- Submission and evaluation of this appeal does not guarantee an increase in aid offered.
 - The Pell Grant may be the only additional aid available for consideration.
- Upon review, additional documents may be requested before processing can continue.
- Once the appeal is complete and all documentation has been received by OSFA, please allow up to 25 business days for processing.
- The deadline to submit a 2024-2025 Parent Contribution Appeal is **April 10, 2025**.

Instructions:

- Complete this form in its entirety; **answer all questions**.
 - If a situation does not apply to your parents, enter **zero (0)** or **N/A**.
 - **Incomplete forms will not be accepted and will delay processing.**
 - Submit all pages of this form, along with any other pending financial aid documents, by secure upload to nau.edu/OSFAdoc-upload.

B. Reason(s) for filing the appeal for the 2023 calendar year
<p>Please mark the reason(s) for filing this contribution appeal. Please mark all that apply:</p> <p><input type="checkbox"/> Reduction or Loss of Employment: Your parent and their spouse’s income earned in 2023 was less than that earned in 2022.</p> <p><input type="checkbox"/> Reduction or Loss of Untaxed Income: Your parent and their spouse’s 2023 benefits have been reduced or ceased in 2022.</p> <p><input type="checkbox"/> Change in Marital Status: Your parent was married in 2022 but in 2023 were separated, divorced, or widowed after FAFSA was filed.</p> <p><input type="checkbox"/> One-Time Payment Received: Your parent and/or their spouse received a one-time, lump sum payment in 2022 that they did not receive in 2023.</p> <p><input type="checkbox"/> Medical Expenses: Your parent and/or their spouse incurred medical/dental expenses (required treatment rather than elected care) in calendar year 2023 that were not reported on their 2022 tax return.</p> <p><input type="checkbox"/> Private Education Tuition (K-12): Your parent and/or their spouse paid private tuition paid for dependents who attended K-12 during the 2023 year.</p>

C. Personal Statement

Please write a detailed explanation of the reason(s) for your appeal. You may attach a separate piece of paper if additional space is needed.

D. Household Size – Dependent Student – answered ‘No’ to all Dependency Status questions on the FAFSA

1. List everyone in your parents’ household for whom they will provide more than half of their monetary support from July 1, 2024, through June 30, 2025, including:

- Yourself;
- Your parents (including a stepparent)
- Your parent’s (and stepparent’s) other children, even if they do not live with your parents; and
- Other people, if they now live with your parents, and your parents provide more than half of their support and will continue to provide that support.

2. List all household members specified in the applicable list above.

Include the college name for any household member who will be enrolled **at least half-time** at an eligible postsecondary educational institution any time between July 1, 2024, and June 30, 2025. *Attach additional pages if necessary.*

Full Names of Each Household Member	Age	Relationship to Student	College Attending 2024-2025
		Self (student)	Northern Arizona University

E. PARENT – Tax Forms and Income Information (dependent students only)

1. As of the date you filed the 2024-2025 FAFSA, were your parents married?

- No – proceed to questions 2 & 4.
- Yes – proceed to questions 3 & 4

2. Unmarried Parent: Did your parent file a 2023 federal tax return? (Select one)

<input type="checkbox"/> Yes	Submit	<ul style="list-style-type: none"> • Copy of your parents 2023 tax return (signed and dated, with all schedules) or an IRS Tax Transcript • Copies of all your parents 2023 W2s and 1099s • If parent is now divorced; <ul style="list-style-type: none"> ○ Copy of your parents 2023 tax return (signed and dated, with all schedules) or an IRS Tax Transcript, and ○ All 2023 W2s and/or 1099s for parent(s) ○ Copies of final divorce decree (decree page and completed signature page including court stamp/signatures) along with pages related to child support and/or spousal support. • If parent is now separated: <ul style="list-style-type: none"> ○ Copies of your parent’s separation agreements (agreement page and completed signature page, including court stamp and signatures. ○ If state does not recognize legal separation: <ul style="list-style-type: none"> ▪ Signed and dated statements from parent concerning separation. ▪ Documentation must be signed and dated and include date of separation. ▪ Documentation must include explanation of spouse or parent no longer providing support for child / spouse. ▪ Documentation showing separate living environments – copy of utility bills, copy of lease with different address. • If parent is now widowed: <ul style="list-style-type: none"> ○ For widowed status, documentation required is a copy of the death certificate or obituary for your parent’s spouse. 												
<input type="checkbox"/> Not yet – will file	Ineligible	<ul style="list-style-type: none"> • If your parent has not filed their 2023 Tax Return with the IRS, you are not eligible for a Contribution Appeal until their taxes are filed. 												
<input type="checkbox"/> No – no earnings from work	Submit	<ul style="list-style-type: none"> • Verification of Non-Filing Letter <ul style="list-style-type: none"> ○ Form can be found at https://nau.edu/office-of-scholarships-and-financial-aid/forms/ under “Verification”, “Aid Year – 2023-2024”. 												
<input type="checkbox"/> No – had earnings from work but not required to file.	Submit	<ul style="list-style-type: none"> • Enter all sources of earned income, and • All 2023 W2s and/or 1099s for income reported below, and • Verification of Non-Filing Letter <ul style="list-style-type: none"> ○ Form can be found at https://nau.edu/office-of-scholarships-and-financial-aid/forms/ under “Verification”, “Aid Year – 2024-2025”. <table border="1" data-bbox="516 1646 1515 1787" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="width: 40%;"></th> <th style="width: 30%;">Employer / Source</th> <th style="width: 30%;">Amount</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Parent</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Employer / Source	Amount	Parent								
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Parent														

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3. Married Parent: Did your parent & their spouse file a joint 2023 federal tax return? (Select one)

<input type="checkbox"/> Yes	Submit	<ul style="list-style-type: none"> • Copy of your parents joint 2023 tax return (signed and dated, with all schedules) or an IRS Tax Transcript • Copies of all 2023 W2s and 1099s for your parent and their spouse. 																									
<input type="checkbox"/> Not yet – will file a joint return	Ineligible	<ul style="list-style-type: none"> • If your parent has not filed their 2023 Tax Return with the IRS, you are not eligible for a Contribution Appeal until their taxes are filed. 																									
<input type="checkbox"/> No – each filed a separate return	Submit	<ul style="list-style-type: none"> • Copies of both your parents 2023 tax returns (signed and dated, with all schedules) or IRS Tax Transcripts • Copies of all 2023 W2s and 1099s for your parent and their spouse • If one spouse filed a 2023 return and one did not: <ul style="list-style-type: none"> ○ Submit a copy of 2023 tax return (signed and dated, with all schedules) or an IRS Tax Transcript, and ○ Verification of Non-Filing Letter for non-filing spouse <ul style="list-style-type: none"> ▪ Form can be found at https://nau.edu/office-of-scholarships-and-financial-aid/forms/ under “Verification”, “Aid Year – 2024-2025” 																									
<input type="checkbox"/> No – one or both had earnings from work but neither required to file <i>Note: Per IRS Publication 17, you must file a 2023 tax return if you earned \$25,100 or more.</i>	Submit	<ul style="list-style-type: none"> • Enter all sources of earned income for person(s) not required to file a 2023 tax return, and • All 2023 W2s and/or 1099s for income reported below, and • Verification of Non-Filing Letter for both <ul style="list-style-type: none"> ○ Form can be found at https://nau.edu/office-of-scholarships-and-financial-aid/forms/ under “Verification”, “Aid Year – 2024-2025”. <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="width: 40%;"></th> <th style="width: 30%;">Employer / Source</th> <th style="width: 30%;">Amount</th> </tr> </thead> <tbody> <tr> <td rowspan="5" style="text-align: center; vertical-align: middle;">Parent</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td rowspan="5" style="text-align: center; vertical-align: middle;">Spouse</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>		Employer / Source	Amount	Parent											Spouse										
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4. Did your parent and/or their spouse have untaxed income from either of the following on their 2023 tax return(s)?

- IRA Distribution No Yes – Rollover amount, if any: \$ _____
- Pension No Yes – Rollover amount, if any: \$ _____

F. Asset Information – Parent Information

1. Enter the following information for each of the assets owned by parent(s):

Asset Type	Amount
Cash Savings	
Investment Net worth *Do not include value of primary home that your parents live in. *Do not include 401K or retirement plans.	
Business / Farm Net Worth	

4. During the 2023 calendar year, did your parent(s) receive a one-time payout?

- No
 Yes, please fill out information below and submit documentation of the one-time payout.

Examples include lottery winnings, withdrawals from a 401K or other retirement plan, etc.

One Time Payout	Amount	Source
Parent Name		
Parent Name		

5. During the 2023 calendar year, did your family experience medical / dental expenses that were not covered by insurance and not deducted on the 2023 tax return?

- No
 Yes
- List the amount of medical / dental expenses not covered by insurance: _____

You will need to submit copies of **paid** receipts for all medical / dental expenses paid by your parent in the 2023 aid year and not included as deductions on your 2023 tax return. Paid receipts must include:

- Provider detailed statements that show:
 - Patient First and Last Name
 - Provider Name, Address and Phone Number
 - Date of Payment
 - Type of Payment
 - Amount of Payment

6. During the 2023 calendar year, did your parent(s):

- Pay private education tuition for K-12 educational expenses.
- List the amount of private education tuition expenses: _____
- Pay college tuition for a parent who did not submit their own FAFSA.
- List the amount of college tuition paid for parent(s): _____
- If you selected either box, **submit** copies of paid tuition receipts for dependents or parents listed on the 2023 federal tax return.

Important: Review this form before signing to confirm all fields have been completed. If a situation does not apply to you, enter **0** or **N/A**. Incomplete forms will not be processed and will be shredded for security purposes.

I. Agreement and Understanding

By signing this form, you certify that all of the information reported on this form is true and accurate to the best of your knowledge. If requested, you agree to provide proof of the information that you have reported on this form. If you purposely give false or misleading information on your FAFSA or on this form, you may be fined, sentenced to jail, or both (20 U.S. Code § 1097) and may face disciplinary action at Northern Arizona University.

By signing this form, you also acknowledge the following statements:

- My appeal will be denied if I already have an Student Aid Index (SAI) of zero or a negative number (as it is the lowest possible SAI).
- Evaluation of my appeal does not guarantee an increase in aid.
- Evaluation of my appeal could result in a decreased or increased SAI and/or impact my awarded need-based aid (e.g., Federal Pell Grant, institutional grants, and subsidized loans).
- While awaiting an appeal decision, I will assume responsibility for all tuition/fees and other university charges regardless of the appeal decision.

Both signatures must be handwritten. Typed or electronic signatures cannot be accepted.

Student Signature		Date	
Parent Signature		Date	