

2024 – 2025 Student Contribution Appeal

A. Student Information			
Name		7-digit NAU ID Number:	
Phone		Student NAU Email	

Information for completing the contribution appeal:

- This appeal is only considering circumstances that occurred in the year **2023**.
- **Prior to submission of this form, student 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 Student Contribution Appeal is **April 10, 2025**.

Instructions:

- Complete this form in its entirety; **answer all questions**.
 - If a situation does not apply to you or your spouse, enter **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 (and/or your 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 (and/or your spouse’s) 2023 benefits have been reduced or ceased in 2022.</p> <p><input type="checkbox"/> Change in Marital Status: You were married in 2022 but in 2023 you were separated, divorced, or widowed after FAFSA was filed.</p> <p><input type="checkbox"/> One-Time Payment Received: You (and/or your spouse) received a one-time, lump sum payment in 2022 that you did not receive in 2023.</p> <p><input type="checkbox"/> Medical Expenses: You or your spouse incurred medical/dental expenses (required treatment rather than elected care) in calendar year 2023 that were not reported on your 2023 tax return.</p> <p><input type="checkbox"/> Private Education Tuition (K-12): You or your spouse paid private tuition paid for dependents who attended K-12 during the calendar year 2023.</p>

C. Personal Statement

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

D. Household Size – Independent Student – answered “Yes” to one or more Dependency Status questions on the FAFSA

1. List everyone in your household for whom you will provide more than half of their monetary support from July 1, 2024, through June 30, 2025, including:
 - Yourself
 - Your spouse, if married
 - Your children, even if they do not live with you and
 - Other people, if they now live with you, and you will continue to provide their 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. STUDENT – Tax Forms and Income Information (include spouse, if applicable)

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

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

2. Unmarried Student: Did you file a 2023 federal tax return? (Select one)

<input type="checkbox"/> Yes	Submit	<ul style="list-style-type: none"> • Copy of your 2023 tax return (signed and dated, with all schedules) or an IRS Tax Transcript <ul style="list-style-type: none"> ○ Copies of all 2023 W2s and 1099’s • If you are now divorced: <ul style="list-style-type: none"> ○ 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 you are now separated: <ul style="list-style-type: none"> ○ Copies of 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 student concerning separation. ▪ Documentation must be signed and dated and include date of separation. ▪ Documentation must include explanation of spouse no longer providing support for child / yourself. ▪ Documentation showing separate living environments – copy of utility bills, copy of lease with different address. • If you are now widowed: <ul style="list-style-type: none"> ○ A copy of the death certificate of your spouse or copy of obituary. 												
<input type="checkbox"/> Not yet – will file	Ineligible	<ul style="list-style-type: none"> • If you have not filed your 2023 Tax Return with the IRS, you are not eligible for a Contribution Appeal until your 2023 taxes are filed. 												
<input type="checkbox"/> No – no earnings from work	Submit	<ul style="list-style-type: none"> • Independent Students – 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”. 												
<input type="checkbox"/> No – had earnings from work but not required to file <i>Note: Per IRS Publication 17, you must file a 2023 tax return if you earned \$13,850 or more.</i>	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 • Independent students – 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 1503 1515 1644" 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; vertical-align: middle;">Student</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	Student								
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Student														

3. Married Student: Did you and your spouse file a joint 2023 federal tax return? (Select one).

<input type="checkbox"/> Yes	Submit	<ul style="list-style-type: none"> • Copy of your joint 2023 tax return (signed and dated, with all schedules) or an IRS Tax Transcript • Copies of all 2023 W2s and 1099s for both you and your spouse
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<input type="checkbox"/> Not yet – will file	Ineligible	<ul style="list-style-type: none"> If you have not filed your 2023 Tax Return with the IRS, you are not eligible for a Contribution Appeal until your 2023 taxes are filed. 																	
<input type="checkbox"/> No – each filed a separate return	Submit	<ul style="list-style-type: none"> Copies of both your and your spouse’s (signed and dated, with all schedules) or IRS Tax Transcripts Copies of all 2023 W2s and 1099s for both you and your spouse If one spouse filed a 2023 return and one did not: <ul style="list-style-type: none"> Submit a copy of tax return (signed and dated, with all schedules) or an IRS Tax Transcript, 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” 																	
<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 \$27,700 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 <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="516 808 1515 1056"> <thead> <tr> <th></th> <th>Employer / Source</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td rowspan="3" style="text-align: center;">Student</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td rowspan="3" style="text-align: center;">Spouse</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>		Employer / Source	Amount	Student							Spouse						
	Employer / Source	Amount																	
Student																			
Spouse																			

4. Did you and/or your spouse have untaxed income from either of the following on your 2023 tax return(s)?

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

F. Asset Information

1. Enter the following information for each of the following assets owned by you and your spouse (if married).

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

2. During the 2023 calendar year, did you or your spouse 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.

Amount	Source

3. During the 2023 calendar year, did you, your spouse or your children 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 you 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

4. During the 2023 calendar year, did you pay private education tuition for K-12 educational expenses for your dependents?

No

Yes

- If yes, please enter the following information below:

Dependent Name	School / Organization	Amount

G. Review of Form

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.

H. 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 a 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.

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

Student Signature: _____ **Date:** _____