

Baptist University of Florida

Request for Professional Judgment

2024-2025

Office of Financial Aid
5400 College Drive | Graceville, FL 32440
(850) 263-3261 ext. 461

Last Name: _____ First Name: _____ M.I.: _____

Date of Birth: _____ BUF ID #: _____

Home Phone: _____ Cell Phone: _____

Address: _____

City: _____ State: _____ Zip: _____

REQUEST FOR PROFESSIONAL JUDGMENT INSTRUCTIONS

Financial aid eligibility for the 2024-2025 academic year is calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). The income and asset information that you submitted was evaluated by a formula called Federal Methodology as set by Congress. This formula assumes that 2022 income is a good predictor of the family's financial strength during the student's 2024-2025 enrollment. Based on this assumption, financial aid eligibility is determined using 2022 tax return information.

The Office of Financial Aid at the Baptist University of Florida recognizes that many families have changes in income or family situations that cannot be reflected in the 2022 tax return data. Therefore, it is possible for students to appeal their financial aid eligibility if they have unique financial circumstances.

A request for Professional Judgment may be filed if you have extenuating circumstances, which you believe warrant a reevaluation of your financial aid. **If your Student Aid Index (SAI) is 0, do not Submit this form.** Students with a 0 SAI are already receiving the maximum benefit of Federal Aid.

Circumstances may include, but are not limited to:

- Loss or change of employment
- Loss or change in amount of child support, Social Security, or other benefits
- Divorce or separation of parents or spouse
- Death of parent(s) or spouse
- Unusual medical expenses (not covered by insurance)
- One-time taxable income used for life-changing events (e.g. IRA, pension distributions, back-year Social Security payments)
- Student's parent has retired

Circumstances that are NOT considered extenuating include, but are not limited to:

- Standard living expenses (e.g. utilities, credit card payments, children's allowances, etc.)
- Mortgage payments
- Car payments
- Credit card or other personal debts
- Vacation expenses
- All other discretionary expenses

All Requests for Professional Judgment require Tax Return Transcripts for student and parent (if student is dependent) along with W-2's and/or 1099's used to complete the tax return. You may obtain a tax return transcript by going online to www.irs.gov or you can call the IRS at 1-800-908-9946 and follow the prompts to request a Tax Transcript for 2022.

Please allow 3 to 4 weeks processing time from the time all documentation has been submitted. Notification of the decision by the Office of Financial Aid will be sent to your BUF e-mail address. All decisions made by the Office of Financial Aid concerning special circumstances are final. If you have questions, please contact us at 850-263-3261 ext. 471.

Check Reason	Documentation Required
<input type="checkbox"/> Loss or change in employment	<ul style="list-style-type: none"> • For Professional judgments due to job loss, there is a waiting period of 10 weeks from date of termination • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances • Copy of 2022 and 2023 Tax Return Transcript and W-2's for student (spouse) and parents (if dependent) • Letter from former employer(s) stating the last date of employment • Copy of unemployment compensation letter or signed statement that you did not or will not receive unemployment benefits • Copy of last paystub(s) from former employer(s) and current employer(s), if applicable. • Copy of DD214 if appeal is due to discharge from active military duty
<input type="checkbox"/> Loss or change in amount of child support, social security or other benefits	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances • Copy of 2022 and 2023 Tax Return Transcripts and W-2's for student (spouse) and parents (if dependent) • If benefit is terminated, provide documentation of monthly benefit amount and date of benefit termination • If benefits are reduced, provide documentation of original amount, date of reduction and reduced amount
<input type="checkbox"/> Divorce or separation of parents or spouse	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances • Copy of 2022 and 2023 Tax Return Transcript and W-2's for student and parents (if dependent) • Copy of legal separation documentation, proof of separate households, or divorce decree
<input type="checkbox"/> Death of parent(s) or spouse	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances • Copy of 2023 Tax Return Transcript and W-2's for student and parents (if dependent) • Copy of death certificate
<input type="checkbox"/> Parent(s) attending college. Parent(s) must be enrolled at least half-time during the 2023-2024 academic year and working toward a degree.	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form. • Enrollment verification from school's Registrar's Office. • Documentation of required book and supply costs. • Proof of tuition payments from school. • Statement identifying unreimbursed educational costs.
<input type="checkbox"/> Unusual Medical Expenses (Out of Pocket)	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances • Copy of 2022 and 2023 and Tax Return Transcripts and W-2's for student (spouse) and parents (if dependent) • If you didn't itemize, please submit proof of payment (e.g. cancelled checks, receipts, credit card statements)
<input type="checkbox"/>	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances

One-time taxable income (e.g. IRA, Pension distribution, back-year Social Security Payments)	<ul style="list-style-type: none"> • Copy of 2022 and 2023 Tax Return Transcripts and W-2's for student (spouse) and parents (if dependent) • Documentation to identify the source of the income • Proof of payment and an itemized statement showing how the funds were spent (e.g. cancelled checks, receipts, bank statements)
<input type="checkbox"/> Student's parent has retired	<ul style="list-style-type: none"> • 2024-2025 Request for Professional Judgment form • Detailed letter explaining your circumstances • Copy of 2022 and 2023 Tax Return Transcript and W-2's for student and parents (if dependent) • Documentation of monthly income sources for all retirement income, including social security (if applicable)

Professional Judgment Form Continued Name: _____ BUF ID #: _____

PARENT INCOME INFORMATION
(FOR DEPENDENT STUDENTS ONLY)

Please complete the table below to help us assess your actual income for 2024. Report all income you expect to receive through December 31, 2024, in the appropriate boxes. You must include documentation supporting all income.

Income for 2024 (Jan. 1-Dec. 31)	Actual 01-01-24 to Today	Estimated Today to 12-31-24	Totals= Actual + Estimated
Father's income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Mother's income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other taxable income (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.) SOURCE:	\$	\$	\$
Social Security benefits	\$	\$	\$
Child Support received	\$	\$	\$
Other untaxed income (earned income credits, welfare benefits, workers' comp., payments to IRA/Keogh, etc.) SOURCE:	\$	\$	\$
Total Parental Income for 2024	\$	\$	\$

STUDENT INCOME INFORMATION

Please complete the table below to help us assess your actual income for 2024. Report all income you expect to receive through December 31, 2024, in the appropriate boxes. You must include documentation supporting all income.

Income for 2024 (Jan. 1-Dec. 31)	Actual 01-01-24 to Today	Estimated Today to 12-31-24	Totals= Actual + Estimated
Student's income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Spouse's income earned from work (wages, salaries, tips, net farm or business)	\$	\$	\$
Other taxable income (dividends, interest, pensions, annuities, alimony, unemployment compensation, capital gains, etc.) SOURCE:	\$	\$	\$

Social Security benefits	\$	\$	\$
Child Support received	\$	\$	\$
Other untaxed income (earned income credits, welfare benefits, workers' comp., payments to IRA/Keogh, etc.) SOURCE:	\$	\$	\$
Total Parental Income for 2024	\$	\$	\$

ASSET INFORMATION

Please list the current asset information (if any of the following are applicable):

Current Assets	Parent Assets (For Dependent Students Only)	Student (and Spouse if Married) Assets
Current amount of cash, savings, and checking	\$	\$
Current net worth or real estate/investments (other than home)	\$	\$
Current net worth of farm or business	\$	\$

CERTIFICATION AND SIGNATURES

I certify that the above and attached is true, correct and complete. I am aware that misrepresentation in this matter may subject me to civil and criminal penalties and to required repayment to governmental agencies.

I further understand that the above information may or may not affect my aid eligibility and is subject to evaluation by the aid officer at this educational institution. Action taken by one school may not be duplicated at a second school. Actions taken for one year of aid will not necessarily be duplicated in the next or subsequent year.

Parent Signature: _____ Date: _____
(For Dependent Students Only)

Student Signature: _____ Date: _____

THE OFFICE OF FINANCIAL AID USE ONLY

Status of Request: Denied Approved More Information Needed

Director of Financial Aid Signature: _____ Date: _____

Explanation or Reason: _____

