
RETIREMENT ACCOUNT WITHDRAWAL - FEDERAL AID ONLY

IMPORTANT: Only submit this form if you meet the Special Circumstance listed above. You will need to submit all of the documentation listed under the Required Documentation box (next page) in order for TCNJ to process your request.

A. Student's Information

Student's Last Name Student's First Name Student's M.I. PAWS ID

B. Instructions:

Before petitioning for a Special Circumstance, a completed 2021-2022 Free Application for Federal Student Aid (FAFSA) must be on file with the Financial Aid Office at TCNJ.

Incoming students will not be evaluated for a Special Circumstance until their deposit has been paid.

Returning students can begin to submit their information February 1st of the year for which they will be applying for aid.

In addition to submitting the information for the chosen Special Circumstance category, TCNJ must verify the data you provided on your FAFSA. Therefore, all students are required to submit the following documents:

- If the student, spouse (if applicable), or parent filed a 2019 Federal Tax Return, attach a copy of the 2019 **IRS Tax Return Transcripts or a signed "home copy" of your tax return** along with all W-2 Form(s). Please copy and paste the following link on your browser for instructions on how to request a Transcript, if needed:
 - <https://www.irs.gov/individuals/get-transcript>
- Dependent students must complete a Dependent Verification Form. Independent students must complete an Independent Verification Form. These forms are located on our website. Please copy and paste the following link on your browser to access the forms:
 - <https://financialaid.tcnj.edu/forms/verification-forms/>
- A personal statement from the student/parent detailing the circumstance. Please be specific.

You must submit this form ALONG WITH all the required documentation. Incomplete submissions will not be evaluated. Please call us at (609) 771-2211 with any questions.

Student's name: _____ PAWS ID: _____

C. Special Circumstance Certification:

Select the calendar year in which the Special Circumstance occurred: 2019: _____ 2020: _____ 2021: _____

Review and complete the information below.

Circumstance	Reason	Required Documentation
Retirement account withdrawal	Withdrawal from a retirement account that is listed on the 2019 tax return	<ul style="list-style-type: none"> • 2020 Tax Return Transcript and • IRS form 5329 which shows the withdrawal was due to an economic hardship <p>NOTE: Only the difference between the 2019 and 2020 Tax returns is used to adjust the income in these cases.</p>

In addition to the required documentation, please complete the following information:

No additional documentation is required.

Please note that this Special Circumstance is allowable ONLY for Federal Financial Aid

D. Certification and Signature

By signing this worksheet I certify that all of the information reported on it is complete and correct.

WARNING: If you purposely give false or misleading information on this worksheet, you may face TCNJ disciplinary action, be fined and sentenced to jail.

Student's Signature

Date

STOP! You must submit this form ALONG WITH all of the required documentation. Incomplete submissions will not be evaluated. Information can be submitted via e-mail, fax or USPS mail. We suggest you put your name and PAWS ID on all submitted documents.

Email: osfa@tcnj.edu

Fax: (609) 637-5154

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