
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 2022-2023 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 March 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 2020 Federal Tax Return, attach a copy of the 2020 **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: 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 2020 tax return	<ul style="list-style-type: none"> • 2021 Tax Return Transcript and • A brief statement indicating the reason for the withdrawal <p>NOTE: Only the difference between the 2020 and 2021 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 – the State of NJ (HESAA) requires that you appeal this change with them directly and you must provide IRS form 5329 (economic hardship) for review consideration.

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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