



EXPECTED FAMILY CONTRIBUTION APPEAL

We're always mindful of your future, so when financial circumstances become a roadblock to your family's ability to pay for school, we're ready to help you find another path. If your family's current income becomes substantially less than what's reported on your Free Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADAA), or if your family is experiencing extenuating financial circumstances, you can request an **Expected Family Contribution Appeal (EFC)** and we'll work with you to get you back on the right course. The amount of additional support you could receive will depend on the change in your EFC (cannot be reduced below \$0).

Once submitted, we review your EFC appeal and supporting documentation and make appropriate adjustments to your financial aid offer, if possible.

HOW TO APPEAL



Berkeley Financial Aid Forms

Visit: financialaid.berkeley.edu/forms you will need to log in using your CalNet ID.

NEWLY ADMITTED STUDENTS, you will be able to access the website that allows you to submit an appeal after you accept your offer of admission and create a CalNet ID. If you need immediate assistance, contact Cal Student Central.

QUESTIONS? CONTACT US!

Cal Student Central: 510-664-9181 | studentcentral.berkeley.edu

Financial Aid & Scholarships Office: financialaid.berkeley.edu

Bears for Financial Success: financialaid.berkeley.edu/bffs

CIRCUMSTANCES WE **WILL** GENERALLY CONSIDER

Loss or reduction of income including, but not limited to: Loss of employment, reduction of pay, death of a parent or spouse, and reduction/loss of child support | Divorce or separation | One-time only income distribution | High medical and/or dental expenses paid out of pocket, tax liens, and K-12 private education | Impacted by a natural disaster

CIRCUMSTANCES WE **WILL NOT** GENERALLY CONSIDER

Changes to, or inability to liquidate assets | Loss of overtime or bonus | Bankruptcy, foreclosures or collection costs associated with outstanding debts | Consumer debt (credit cards, car payments, loans, etc.) | Lottery or gambling winnings or losses | One-time income used for non-life essential items (e.g. family vacation) | Parents (step parents or biological parents) who do not wish to provide support | Marital separation where parents are still living together | Requests from families that have a zero EFC on their aid application | Requests to negotiate an aid offer based on merit/academic profile or offers received from another school.

All EFC appeals require statements describing, in detail, the circumstances surrounding the reason(s) for appealing. Additionally, we require documentation that supports the specific circumstances outlined in your statement.

Reduction or Loss of Employment or Benefits

Copy of employment termination letter or other benefits, including verification of any severance pay | Copy of year to date earnings (last paycheck stub or last year's W2 wage forms), unemployment statements, disability benefit statement severance pay | Signed copies of Federal income tax returns from the past 2 years, including all schedules/attachments (if not previously submitted to our office during the verification process).

Change in Marital Status AFTER Aid Application was Completed

Proof of separation (separation agreement or documents that show parents are no longer living together with an intention to divorce), divorce decree, or death certificate.

Reduction or Loss of Untaxed Income

This includes: (child support, untaxed portions of IRS or pension distributions [rollovers], or other untaxed income.) Copy of divorce/separation agreement, verification of a rollover (1099-R), or other documentation indicating the start and end date of benefits.

One-Time, Lump Sum Payment that DID NOT Happen in Prior or Subsequent Years

Signed copies of Federal Income Tax returns from the last 2 years, including all schedules/attachments (if not previously submitted to our office during the verification)

Out of Pocket Medical Expenses, Tax Liens, or K-12 Private School Tuition

Statement from the insurance provider or estimated out of pocket expenses that will be incurred during from July 1 - June 30 of the year you will be in school | Statement from the IRS and/or State Franchise Tax Board indicating monthly payment amounts on back taxes | K-12 private school tuition statement detailing out cost and financial aid recieved.

Expenses Related to a Natural Disaster

Copies of insurance policies, which may include home, rental property, car, and/or business that documents deductibles or unreimbursed expenses | FEMA application, contractor quotes, invoices, and/or receipts.