2017-2018 Petition for Direct Unsubsidized Loan (For students whose parents refuse to complete the FAFSA)

Federal law states that a dependent student (based on the federal financial aid definition) must provide parental information on the Free Application for Federal Student Aid (FAFSA). In cases where parents (both mother and father) have permanently ended all financial support of the student and refuse to complete the parent section of the FAFSA, the student may submit a Petition for Direct Unsubsidized Loan.

Parent(s) who are required to sign this Petition:
- The parent(s) information that would have been used on the student’s FAFSA. This parent will be referred to as “the FAFSA Parent” throughout this document and form.
  - Your biological parent
  - Your legally adoptive parent
  - Include your step-parent if your biological or adoptive parent has remarried
  - Note that grandparents, foster parents, and legal guardians are NOT considered parents for the purposes of FAFSA.
- If your parents are married to each other, or are living together but not married to each other, both signatures are required.
- If your parent has NEVER been married AND you do not know or have contact with the other parent, only one signature is needed.
- If your parents are divorced or legally separated (and not living together), you will determine the appropriate parent by the ranked criteria below:
  - Parent you have lived with more over the past 12 months. If this does not apply, then,
  - Parent who provided more financial support over the past 12 months. If this does not apply, then,
  - Parent who provided more financial support during the most recent year you received financial support.
- If your parent(s) refuse to complete this form, you must provide at least two (2) letters from a third-party to verify why the parent(s) refuse to provide the student with financial support and complete the student’s FASFA.

Steps to complete form:

Student:
1. Read and initial each statement in section 1.
2. Complete sections 3, 4 and 5
3. Complete and sign section 6
4. Submit a copy of your 2015 tax transcript and a copy of your 2016 tax transcript. Note: the IRS Data Retrieval Tool is currently unavailable.
5. Submit documentation, as required, for your answers in Section 3 and 4. If your parents refuse to sign this form, submit documentation from a third party (as stated above).

Parents (If Applicable):
1. Read and initial each statement in section 1.
2. Complete and sign Section 2.
### Section 1: Parent and Student – Initial each statement below

<table>
<thead>
<tr>
<th>Parent</th>
<th>Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is always in the student’s best interest to submit a FAFSA with parents’ income information.</td>
<td>Providing income and household information to FAFSA does not require parents to provide financial support.</td>
</tr>
<tr>
<td>The student will only be eligible for a Federal Direct Unsubsidized Loan if this petition is approved. The interest rate of 3.76% will begin accruing on the loan when it is disbursed and will continue to accrue even when the student is not enrolled in school. <em>(beginning July 1, 2016)</em></td>
<td>The amount of Federal Direct Unsubsidized Loan is limited to the annual grade level limit for dependent students. <em>(Freshman = $5,500; Sophomore = $6,500; Junior / Senior = $7,500)</em></td>
</tr>
<tr>
<td>If approved, the student will not be eligible for desirable aid, including, but not limited to: ➢ Federal Pell Grants ➢ Federal Supplemental Educational Opportunity Grant (FSEOG) ➢ Federal Work Study ➢ Federal TEACH Grant Program ➢ Tennessee Education Lottery Scholarship Program (TELS)</td>
<td>➢ Tennessee State Assistance Award (TSAA) ➢ Federal Direct Subsidized Loans ➢ Federal Perkins Loans ➢ Federal Parent PLUS Loans ➢ Financial need-based scholarships</td>
</tr>
</tbody>
</table>

### Section 2: Parent Certification *(Signatures must be physical – no electronic signatures accepted)*

I certify that:
- ✓ I refuse to provide income information and household information on the Federal Financial Aid application (FAFSA).
- ✓ I (We) have stopped all financial support of my son or daughter has ended as of ____________ (date), including, but not limited to:
  - Cash support
  - Health Insurance
  - Auto Insurance
  - Use of a vehicle
  - Cell Phone plan
  - Claimed as a dependent on tax return for 2016 and future years
  - Non-cash support, such as room & board, co-signor of any type of loan or housing lease
  - Educational assistance, such as tuition discounts, G.I. Bill, qualified tuition plans
- ✓ I will not provide any financial support in the future.
- ✓ The information provided is correct and true. If I am found to have knowingly or intentionally given false statements, I may be fined, sent to prison, or both.
- ✓ I understand that this Petition impacts aid only at MTSU for the 2017-2018 academic year.

Printed Name of Parent 1 (father/mother/stepparent) ____________________________
Printed Name of Parent 2 (father/mother/stepparent) ____________________________

Signature ____________________________ Date ____________
Signature ____________________________ Date ____________

### Section 3: Student income

Did you file a 2015 tax return? □ Yes □ No
- If yes, you must submit a tax transcript. Transcripts can be requested through the IRS website.
- If you were not employed in 2015, how did you provide your own support? ____________________________

Are you currently employed for 2016? □ Yes □ No
- If yes, you must submit a copy of your 2016 IRS Tax Return Transcript.
- If no, how are you providing your own support? ____________________________

### Section 4: Student other income
Please provide the following information about any other income for the years / months requested. Do not leave any field blank. If the category does not apply to you, you must enter $0.

<table>
<thead>
<tr>
<th>Other Income Source</th>
<th>2016 Total Received</th>
<th>2017 Estimated Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing, food and other living allowances paid to members of the military, clergy and others (include cash payments and/or the cash value of benefits received)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Social Security Benefits</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Veterans Non-Education benefits (Include Disability, Death Pension, Dependency &amp; Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Veterans Education Benefits (Include Montgomery GI Bill, Dependents Education Assistance Program, Post-9/11 GI Bill)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other untaxed income (such as worker’s compensation, disability). Do not include student aid, earned income credit)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Money received or bills paid on your behalf (include payments of your bills by another person/party not reported elsewhere on this form. For example, if someone is paying your rent, utilities, etc., for you or gives you cash, gift cards, etc., include the amount of that person’s contribution.)</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

Section 5: Student expenses

Living expenses: Provide the following information about your monthly estimated expenses for 2017. If any amount is zero, explain the reason.

Rent / Housing $                    

Please select the option that applies to you:

- I am attaching a copy of my current lease, rental agreement, or mortgage statement.
- I am not able to provide a copy of my current lease or rental agreement. However, I am attaching a signed statement from my landlord and/or my roommate verifying my living arrangements, including my address, the date I began living there and my monthly rent amount.
- I have other living arrangements not listed above. Attach a letter of explanation.

Utilities $                    

Food $                    

Car payment $                    

Car insurance (must provide a copy of an invoice from insurance company as proof of payment) $                    

Cell phone payment (must provide a copy of an invoice from carrier as proof of payment) $                    

Medical insurance (must provide a copy of an invoice from insurance company as proof of payment) $                    

Medical expenses (prescriptions, co-pays, etc.) $                    

Other personal expenses $                    

Section 6: Student Certification (Signature must be physical – no electronic signatures accepted)

I certify that:

- My parent(s) have stopped all financial support, as of ________________ (date), including, but not limited to:
  - Cash support
  - Health Insurance
  - Auto Insurance
  - Use of a vehicle
  - Cell Phone plan
  - Claimed as a dependent on tax return for 2016 and future years
  - Non-cash support, such as room & board, co-sponsor of any type of loan or housing lease
  - Educational assistance, such as tuition discounts, G.I. Bill, qualified tuition plans
- All information provided in my Petition for Direct Unsubsidized Loan is correct and true.
- I understand that this petition impacts aid only at MTSU for the 2017-2018 academic year.
- I have completed my FASFA without parent information for the 2017-2018 academic year.

Student Signature

Date