

Brandeis University Office of Financial Aid Parent Projected 2023 Income Worksheet

Given your special circumstances in 2022-2023, our office would like to consider your current financial situation when determining your student's financial aid eligibility. Please complete this worksheet to calculate your family's projected 2023 income. If a particular line item does not apply, please write "N/A" in the space provided. **Please provide as much supporting documentation as possible (paystubs, unemployment documentation, letter of explanation, etc.).**

Student Name: _____ **Sage ID:** _____

1. Date parent's employment ceased (if applicable) _____
(attach a letter of termination or documentation of medical inability to work)
2. Income earned from work by Parent 1 from 1/1/23 to 12/31/23 *(attach copy of most recent pay stub from each job worked)* \$ _____
3. Income earned from work by Parent 2 from 1/1/23 to 12/31/23 *(attach copy of most recent pay stub from each job worked)* \$ _____
4. Parent(s)' other projected taxable income from 1/1/23 to 12/31/23
 - a. Income earned from business (Sole Proprietorship, S-Corporation, or Partnership) a. \$ _____
 - b. Income earned from real estate b. \$ _____
 - c. State /federal unemployment compensation (attach copy of recent benefit statement) c. \$ _____
 - d. Severance benefits *(attach documentation of company severance package)* d. \$ _____
 - e. Social Security benefits *(attach copy of most recent SS statement)* e. \$ _____
 - f. Interest and dividend income f. \$ _____
 - g. Other (please explain) g. \$ _____

Total projected taxable 2023 income (lines 2-4g) \$ _____

5. Parent(s)' projected untaxed income:
 - a. Social Security benefits a. \$ _____
 - b. Deductible IRA and/or SEP payments b. \$ _____
 - c. Payments to tax-deferred pension and savings plans (e.g., 401(K) and 409(b)) c. \$ _____
 - d. Child support d. \$ _____
 - e. TANF/welfare benefits e. \$ _____
 - f. Untaxed portions of pensions f. \$ _____
 - g. Worker's compensation g. \$ _____
 - h. Other (please explain) _____ h. \$ _____

Total projected untaxed 2023 income (lines 5a-5h) \$ _____

The information provided on this form is accurate and complete to the best of our knowledge. We have already provided or will provide our signed complete 2021 and/or 2022 federal tax returns, including all schedules, W-2s and business returns if applicable. We understand that if financial aid is revised based on this appeal information, we will be required to provide documentation of final 2023 income in January 2024, and our financial aid may be revised and repaid based on actual year-end income. We understand that the student must take advantage of all other sources of financial aid (e.g., federal and state grants, federal subsidized and unsubsidized loans, etc.) in order to receive additional University funds. We also agree to notify Student Financial Services if our income changes.

Parent 1's signature

Parent 2's signature

**Please return this form, with all necessary documentation, to the Office of Student Financial Services,
Brandeis University, MS 027, Waltham, MA 02453**