

Brandeis University Office of Financial Aid Student Projected 2020 Income Worksheet

Please complete the following worksheet to calculate your projected 2020 income. If a particular line item does not apply, please write "N/A" in the space provided. **In order to proceed with your appeal of your financial aid award, this form, as well as a letter explaining your circumstances, must be submitted to the Office of Student Financial Services in conjunction with all indicated documentation.**

Student Name: _____ *Sage ID:* _____

1. Date your employment ceased (if applicable) _____
(attach a letter of termination or documentation of medical inability to work)
2. Income earned from work from 1/1/20 to 12/31/20 \$ _____
(attach copy of most recent pay stub from each job worked)
3. Other projected taxable income from 1/1/20 to 12/31/20:
 - a. Income earned from business (Sole Proprietorship, S-Corporation, or Partnership) \$ _____
 - b. Income earned from real estate \$ _____
 - c. Unemployment compensation *(attach copy of most recent unemployment benefit statement)* \$ _____
 - d. State Unemployment Benefit \$ _____
 - e. Federal Pandemic Unemployment Compensation program (FPUC) (\$600/wk) \$ _____
 - f. Severance benefits *(attach documentation of company severance package)* \$ _____
 - g. Social Security benefits *(attach copy of most recent SS statement)* \$ _____
 - h. Interest and dividend income \$ _____
 - i. Other (please explain) _____ \$ _____

Total projected taxable 2020 income (lines 2-3g)

4. Your projected untaxed income:
 - a. Social Security benefits \$ _____
 - b. Deductible IRA and/or SEP payments \$ _____
 - c. Payments to tax-deferred pension and savings plans (e.g., 401(K) and 415(b)) \$ _____
 - d. Child support \$ _____
 - e. TANF/welfare benefits \$ _____
 - f. Untaxed portions of pensions \$ _____
 - g. Worker's compensation \$ _____
 - h. Other (please explain) _____ \$ _____

Total projected untaxed 2020 income (lines 4a-4h) \$ _____

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 2018 and/or 2019 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 2020 income in January 2021, 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.

Signature

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