

# Brandeis University

## 2026-2027 Need-Based Financial Aid Appeal Worksheet

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| <b><u>Instructions</u></b> |
|----------------------------|

If your circumstances have changed since your initial application, or if you have more information you would like us to consider, you may request a review of your **need-based financial aid** package. Please note: Merit scholarship decisions are final and there is no reconsideration process. We cannot consider appeals based on credit card debt, car or mortgage payments, wedding/celebration expenses, private school costs, or other discretionary expenses.

If you have not already submitted a 2026-2027 FAFSA (if applicable), 2026-2027 CSS/Financial Aid PROFILE, complete copies of the student's and parents' 2024 Federal Tax Returns,\* you must do so before filing an appeal.

To ensure consideration for the academic year starting in August, Early Decision students must submit appeals by March 1, Early Action students by April 1, and Regular Decision students by April 15. There is no specific deadline for returning students, but **appeals from continuing students will not be addressed until after July 15th, 2026.**

Once the Appeals Committee reviews the submitted documentation and determines if the student qualifies for additional aid, we will notify the student by email. Response time will vary based on our volume of appeals at the time you submit your request, but we strive to respond within 10 business days. Additional grant funds will only be offered if a student has taken advantage of all other sources of financial aid (e.g., federal and state grants, subsidized and unsubsidized federal loans, etc.).

**Submission of an appeal does not grant an extension of the bill due date.** All student accounts must be paid in full by the stated due dates even if an appeal is in process. If you have any questions regarding the appeal process, or would like to discuss payment plans, private loans or other bill payment options while waiting on an appeal response, please contact us at (781) 736-3700 or [finaid@brandeis.edu](mailto:finaid@brandeis.edu).

The completed Financial Aid Appeal Worksheet and all required supporting documentation should be submitted to:

Office of Student Financial  
Services Brandeis University  
MS 027, 415 South Street  
Waltham, MA 02454-9130  
EMAIL: [finaid@brandeis.edu](mailto:finaid@brandeis.edu)

*\* Please note: complete copies of tax returns require all pages of your federal return including W-2(s), schedules, statements and business returns (if applicable).*

**Brandeis University**  
**2026-2027 Financial Aid Appeal Worksheet**

Student Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Parent(s)' Name(s): \_\_\_\_\_ Day Phone Number: \_\_\_\_\_

Parent Email Address: \_\_\_\_\_ Parent's Cell Number: \_\_\_\_\_

**Part Ia. Student Appeal (to be completed by student and then proceed to Part III)**

Student's expected income for 2026 is significantly less than 2024. Indicate reason: \_\_\_\_\_

*List your projected gross work income for each of the following periods and proceed to Part III. Provide most recent paystubs from any employment for the time periods below. Do not leave any space blank. Enter "0" if you will have no earnings for a particular period.*

6/1/26 to 8/31/26: \$ \_\_\_\_\_ 9/1/26 to 12/31/26: \$ \_\_\_\_\_ 1/1/27 to 5/31/27: \$ \_\_\_\_\_

**Part Ib. Parent Appeal (to be completed by parent and then proceed to Part II)**

Check the box(es) that best describes your situation and provide copies of the documentation indicated.

☐ Parent is currently unemployed. Unemployed parent is: Parent 1 ☐ Parent 2 ☐

● Date employment ended \_\_\_\_\_

*Attach letter of termination, documentation of severance and unemployment benefits and most recent pay stub for each parent in the household regardless of which parent experienced the income adjustment, along with a complete copy of your 2025 Tax Return.\**

☐ Untaxed income or benefits received in 2024 have ended (i.e. unemployment, social security benefits, housing allowance, etc.).

*Attach documentation from the agency providing the benefit along with a complete copy of your 2025 Tax Return.\**

☐ One-time capital gain or IRA/pension distribution in 2024

*Attach a letter explaining the circumstance that resulted in the capital gain/distribution, along with a complete copy of your 2025 Tax Return.\* The letter must indicate that both the circumstances and capital gain/distribution are one-time occurrences.*

☐ Extraordinary unreimbursed medical and/or dental expenses.

*Attach a detailed letter and supporting documentation of the paid unreimbursed expenses. If you are appealing based on 2025 unreimbursed medical expenses, include a complete copy of your 2025 Tax Return.\* Proceed to Part III if medical expenses are the sole appeal point.*

☐ Death of a parent. Date of death: \_\_\_\_\_

*Attach copy of death certificate and documentation of any death benefits received.*

☐ Other. If none of the above categories describe your family's situation, please attach a detailed letter of explanation and provide documentation of the current circumstances.

## Part II. Projected 2026

Actual income will be verified in January 2027. If changes were made to your financial aid based on your projections and the actual figures are higher, we will adjust your aid accordingly and you may be required to repay financial aid received.

- Complete this section if you are appealing based on a loss of employment or any other income-related change.
- Provide information for all income categories for both parents in the household, not just the income elements that have changed. Enter "0" if no income of a certain type is expected.
- Attach documentation for your figures (i.e. most recent paystubs for both parents, severance benefits letter, unemployment benefits statement, etc.)

| <b><u>Estimated 2026 Taxable Income</u></b> | <b><u>Estimated Income<br/>(1/1/25-12/31/26)</u></b> | <b><u>Documentation<br/>Included</u></b> |
|---|--|--|
| 1. Parent 1's 2026 work income              | _____  | _____                                    |
| 2. Parent 2's 2026 work income              | _____  | _____                                    |
| 3. Severance compensation                   | _____  | _____                                    |
| 4. Interest and dividend income             | _____  | _____                                    |
| 5. Business/real estate income/loss         | _____  | _____                                    |
| 6. Taxable IRA/pension/annuity distribution | _____  | _____                                    |
| 7. Unemployment Benefit                     | _____  | _____                                    |
| 8. Other taxable income                     | _____  | _____                                    |
| 9. Total Taxable Income (1 through 8 above) | _____  |  |

### **Estimated 2026 Untaxed Income**

|                                     |       |       |
|-------------------------------------|-------|-------|
| 1. Untaxed Social Security Benefits | _____ | _____ |
| 2. Child Support Received           | _____ | _____ |
| 3. Untaxed Pension Distributions    | _____ | _____ |
| 4. Payments to Retirement Plans     | _____ | _____ |
| 5. Cash/Gifts Paid on your Behalf   | _____ | _____ |
| 6. Worker's Compensation            | _____ | _____ |
| 7. Other: _____                     | _____ | _____ |

### **APPEALS CANNOT BE PROCESSED WITHOUT THE FOLLOWING**

- \_\_\_ Both pages of this form completed and signed along with a letter explaining special circumstances
- \_\_\_ Copy of signed complete 2025 federal income taxes and W-2(s) and business returns (if applicable)
- \_\_\_ Most recent pay stubs for each parent in household
- \_\_\_ Last pay stub from former position
- \_\_\_ Statement of any unemployment benefits received and/or expected, and
- \_\_\_ All other applicable documentation of special circumstances

## Part III. Certification

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 2024 federal tax returns\*, including all schedules, W-2s and business returns if applicable. We understand that completing this form does not guarantee financial aid will be increased. We also understand that if financial aid is revised based on this appeal information, we will be required to provide documentation of final 2026 income in January 2027, 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.

**Student Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Parent Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_