

PEST

Parent Estimated Income Form
2023-2024Purpose of Form

The Parent Estimated Income Form is used to document parent(s)' income, both taxed and untaxed, for the 2023 calendar year, and may be submitted with certain Appeals for Reconsideration. **Along with this signed form, please remember to submit the two most recent year-to-date paystubs for your parent for all employers (or both parents, if they are married and/or living together). Additional documentation may be requested after we review this document.**

General Instructions

Please do not submit this form unless or until you have been unemployed for at least 90 days.

Table A: Taxable Income

On this table, report all sources of parent estimated taxable income for 2023.

In Column A, report the total amount of income already received from January 1, 2023 through the day that you sign and complete this form, from each of the sources listed (wages, rental income, taxable interest, etc.). This is considered actual income. In Column B, report the total amount of income that your parent(s) expect to receive from the day that you sign and complete this form through December 31, 2023, from each source. This is considered estimated income.

Be sure to report all sources of income, including those from foreign sources.

Example Table A: Taxable Income

TABLE A: TAXABLE INCOME	Column A: Actual Income	Column B: Estimated Income
GROSS INCOME (<i>BEFORE ANY DEDUCTIONS</i>) IN 2023	01/01/2023 to TODAY	TODAY through 12/31/2023
Parent/Step-Parent 1's gross wages and salaries from work	\$30,000	\$15,500
Parent/Step-Parent 2's gross wages and salaries from work	\$45,000	\$0

In the last row of Table A, enter the sum of all values reported in Column A, and the sum of all values reported in Column B.

TOTAL TAXABLE INCOME IN 2023	Total of Column A	Total of Column B
	\$75,000	\$15,500

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**Parent Estimated Income Form
2023-2024****Table B: Untaxed Income and Benefits**

On this table, report all sources of parent estimated untaxed income for 2023.

In Column A, report the total amount of untaxed income already received from January 1, 2023 through the day that you sign and complete this form, from each of the sources listed (child support, tax-exempt interest, housing allowance, etc.). This is considered actual income. In Column B, report the total amount of untaxed income that your parent(s) expect to receive from the day that you sign and complete this form through December 31, 2023, from each source. This is considered estimated income.

Be sure to report all sources of income, including those from foreign sources.

Example Table B: Untaxed Income and Benefits

TABLE B: UNTAXED INCOME AND BENEFITS	Column A: Actual Income	Column B: Estimated Income
GROSS INCOME IN 2023	01/01/2023 to TODAY	TODAY through 12/31/2023
Child support received for all children in household	\$3,000	\$2,000
Workers' compensation/Disability not from Social Security	\$0	\$5,000

In the last row of Table B, enter the sum of all values reported in Column A, and the sum of all values reported in Column B.

TOTAL UNTAXED INCOME IN 2023	Total of Column A \$3,000	Total of Column B \$7,000
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Adjustments to a financial aid award as a result of submitting an Appeal for Reconsideration are neither guaranteed nor immediate and depend upon the availability of funding. Forms received without the appropriate signature(s) or with missing information are considered incomplete and will not be reviewed.

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Parent Estimated Income Form 2023-2024

Student's University ID: - or SIS ID:

Student's Full Name: _____
(LEGAL NAME - PRINT) first middle last

Parent/Guardian Submitting Appeal:

Custodial ☐ Noncustodial ☐ first middle last
(Required for dependent students only)

TABLE A: TAXABLE INCOME	Column A: Actual Income	Column B: Estimated Income
GROSS INCOME (<i>BEFORE ANY DEDUCTIONS</i>) IN 2023	01/01/2023 to TODAY	TODAY through 12/31/2023
Parent/Step-Parent 1's gross wages and salaries from work (include most recent paystub for each employer) Relationship to Student: _____		
Parent/Step-Parent 2's gross wages and salaries from work (include most recent paystub for each employer) Relationship to Student: _____		
Net Business Income or Loss. Do not include amounts already reported as wages above.		
Withdrawals from business used to meet household or personal expenses, if self-employed. Do not include amounts already reported as wages.		
Rental income after deductions		
Interest and dividend income		
Social Security or Disability from SSA (taxable portion only)		
Alimony/Spousal support received (taxable only)		
Pension/IRA distributions (taxable portion only)		
Disability benefits (<i>not</i> from Social Security)		
Severance pay		
Taxable federal unemployment compensation (include Unemployment Benefits Statement from local Department of Labor)		
Other taxable income (Sources: _____ _____)		
TOTAL TAXABLE INCOME IN 2023	Total of Column A \$	Total of Column B \$

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Student's University ID: □□□□-□□□□ or SIS ID: □□□□□□

TABLE B: UNTAXED INCOME AND BENEFITS	Column A: Actual Income	Column B: Estimated Income
GROSS INCOME IN 2023	01/01/2023 to TODAY	TODAY through 12/31/2023
Child support received for all children in household		
Payments to tax-deferred pension and savings plans		
Untaxed IRA/pension/annuities (<i>excluding</i> rollovers)		
Tax-exempt interest income		
Social Security or Disability from SSA (untaxed only)		
Workers' Compensation/Disability <i>not</i> from Social Security		
Welfare benefits (including TANF)		
Additional Child Tax Credit		
Alimony payments received in 2023		
Spousal support received in 2023		
Foreign Income Exclusion		
Housing and Living Allowances (BAS/BAH for military, clergy, missionary, private high school, etc.)		
Cash received or any money/bills paid on your behalf. This includes expenses paid by a non-custodial parent, such as a mortgage, insurance, car payments, etc.		
Cash assistance from family and friends, including those outside the U.S.		
Untaxed federal unemployment compensation		
Other income from foreign sources not reported above		
Other untaxed income (Sources: _____ _____)		
TOTAL UNTAXED INCOME IN 2023	Total of Column A	Total of Column B
	\$	\$

CERTIFICATION STATEMENT: I certify that all the information reported to qualify for federal aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner. I understand that if I purposely give false or misleading information, I may face legal consequences and my financial aid may be terminated.

PARENT SIGNATURE _____ Date _____