



## 2024-2025 Early Financial Aid Checklist

Recruited Athletes Only

### Financial Aid Process

Please note: This is **NOT** an official application for financial aid. If you are admitted to Brown University, you must complete all current Financial Aid Application materials by the published deadline. Application materials include *FAFSA*, *CSS Profile*, and *Non-Custodial Profile* (if applicable). Application requirements for 2024-2025 will be posted to our website in Fall 2023.

<p><b>Step 1</b> <b>Assessment Form</b></p>	<p><b>COMPLETE THE 2024-2025 EARLY FINANCIAL AID ASSESSMENT FORM</b></p> <p><input type="checkbox"/> Complete all pages. <u>Please do not leave any questions blank.</u> Enter zero or N/A if appropriate.</p> <p><input type="checkbox"/> <b>Non-Custodial Parent(s) (if applicable):</b> Complete the 2024-2025 Early Financial Aid Assessment Form for Non-Custodial Parents</p> <p><input type="checkbox"/> <b>Signatures:</b> Remember to have both the student and a parent sign the certification page before sending it to our office.</p>
<p><b>Step 2</b> <b>Tax Returns</b></p>	<p><b>SIGNED COPIES OF 2022 FEDERAL TAX RETURNS</b> Please print the student's name in the upper right corner of the parent tax return</p> <p><input type="checkbox"/> Parent Signed Federal Tax Return* <u>include all pages and schedules</u></p> <p><input type="checkbox"/> Parent 1/Step-Parent 1 W-2</p> <p><input type="checkbox"/> Parent 2/Step-Parent 2 W-2</p> <p><input type="checkbox"/> I/We, the parent(s), certify that I/we did not file and am/are not required to file an income tax return for 2022.</p> <p><input type="checkbox"/> Tax Extension 4868: If this form was filed for 2022, this application will be considered incomplete until 2022 tax returns are received.</p>
<p><b>Step 3</b> <b>Business Returns</b> (If applicable)</p>	<p><input type="checkbox"/> <b>If your parent(s) own all or part of a Corporation, S Corporation, or Partnership:</b> submit a complete and signed copy of 2022 IRS Form 1120, 1120S, or 1065, with K-1s and all related schedules.</p> <p><input type="checkbox"/> <b>If your parent(s) own a Sole Proprietorship or a Farm;</b> submit Schedules C or F along with the complete and signed 2022 IRS Form 1040.</p>
<p><b>Step 4</b> <b>Submitting and Reviewing Assessment Materials and Eligibility</b></p>	<p><b>BANNER SELF SERVICE</b></p> <ul style="list-style-type: none"> <li>• Students will use Banner ID and password to log into Banner Self Service.</li> <li>• All assessment materials must be submitted through Banner Self Service. <a href="#">Details on uploading.</a></li> <li>• Requirements are viewable online in the <b>2023-2024</b> aid year.</li> <li>• An email will be sent to the student advising them that their financial aid eligibility has been determined and is viewable online in the <b>2023-2024</b> aid year.</li> <li>• Financial aid notifications can be viewed and printed from Banner Self Service. Paper notifications will not be sent.</li> </ul>



## 2024-2025 Early Financial Aid Assessment Form

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### A. Student Information

First Name:	Last Name:	Middle Initial:	<b>SPORT:</b>
Address:	City:	State:	Zip:
Student's Email:	Preferred Phone Number:		
Social Security Number:	Citizenship:	State of Legal Residence:	
Amount Parent(s) think they will be able contribute for your 2024-2025 college expenses?			\$ _____
Tuition Benefits from your parent(s) employer			\$ _____

### B. Parent Information

What is the current marital status of your parents? (**Note: If parents are divorced/separated, then non-custodial parent must complete the Non-Custodial Parent Early Financial Aid Assessment Form.**)

Married/Remarried    
  Separated    
  Divorced    
  Widowed    
  Unmarried but live together

If divorced, date of divorce:	If remarried*, date of remarriage:	Name of non-custodial parent:
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\*If remarried, please include current spouse and their incomes and asset information in Section E.

	<input type="checkbox"/> Parent 1 <input type="checkbox"/> Step-Parent 1	<input type="checkbox"/> Parent 2 <input type="checkbox"/> Step-Parent 2
Name:		
Date of Birth:		
Occupation:		
Current Employer:		
No. Years Employed at Current Employer:		
Preferred Daytime Phone:		
Preferred E-Mail:		

### C. Parent 2022 Expenses (per year)

<b>Medical/Dental Expenses NOT covered by insurance (including insurance premiums paid on an after-tax basis).</b>	
If you did not complete the medical/dental section of Schedule A with your 2022 federal income tax return, please estimate your out-of-pocket expenses.	\$ _____
<b>Child Support Paid</b>	
Indicate the amount of support paid by your parent(s) for each child who resides in another household.	\$ _____
Name of child/children for whom the child support was paid: _____	
<b>Educational Loan Payments <i>Minimum payment amount</i></b>	
Include <u>only minimum payments</u> required for educational loans IN PARENT(S)' NAME, including any portion of home debt taken to finance education. <b>Do not include loan payments for students in the household who are currently pursuing an undergraduate degree.</b>	\$ _____
<b>Private Elementary/High School Tuition for Sibling(s) of Brown Student – Include ONLY expenses paid out of pocket</b>	
Name of Private Elementary/High School:	\$ _____
Name of sibling attending: _____	

## D. 2022 Income and Asset Information

### 2022 Untaxed Income and benefits:

a. Social Security benefits received for all family members except the student	\$
b. Social Security benefits received for the student	\$
c. Temporary Assistance for Needy Families (TANF)	\$
d. Child support received for all children	\$
e. Housing, food, and other living allowances received by the military, clergy, and others	\$
f. Pre-tax Contributions to Flex Spending Accounts for child care or health spending	\$
g. Pre-tax Contributions or Deductions to Health Savings Account (HSA)	\$
h. Other	\$

### 2023 Expected Income (estimated)

Income earned from work by parent/stepparent 1:	\$
Income earned from work by parent/stepparent 2:	\$
Other Taxable income:	\$
Untaxed income and benefits:	\$

Asset Type	Current Market Value (as of today)
Cash, Savings, and Checking Accounts:	\$
Investments: Include stocks, bonds, money market accounts, savings bonds, CDs, and college savings and prepaid tuition plans established by parents. Do not include the value of investments in a qualified retirement plan, such as an IRA or 401k:	\$
Total current value of parent(s) retirement accounts:	\$
Total value of assets held in the names of the student's brothers and sisters who are under age 20 and not in college:	\$
Other (explain):	\$

Asset Type	Monthly Mortgage or Rent	Year Purchased	Purchase Price	Current Market Value (as of today)	Current Debt
<b>Home (own)</b> Include home equity loans in the total debt reported:	\$		\$	\$	\$
<b>Home (rent)</b>	\$				
<b>Other Real Estate</b> Include the value and debt of all other real estate that you own:	\$		\$	\$	\$

**Business or Self-Employment** If your parents are self-employed or own a business, please provide the business name, description of the business, and the fair market value of your parents' share of ownership in the business. "Fair Market Value" is the price at which the business could be sold. Please estimate the amount of net proceeds your parents would receive if they sold their share of the business.

Legal Name of Business	Type (LLC, Corporation, Sole Proprietorship, etc.) & description	Fair Market Value	% Ownership
		\$	
		\$	

### Student Asset Information

Cash, Savings, and Checking Accounts:	\$
Total value of non-educational IRS Keogh, 401k, 403b, etc. accounts as of December 31, 2022.	\$
<b>Investments:</b> Current Market Value (including Uniform Gifts to Minors)	\$
Total Value of all trust(s):	\$
Who established trust(s):      Student's Parent      Other	

## E. Household Information

Complete the information below for all those living in your household who will be fully supported by your parent(s) in **2024-2025**.

- Do Not Include yourself (Brown Applicant)
- List Parent/Stepparent
- Others to Include:
  - Siblings and/or stepsiblings; if over the age of 24, parent(s) must be providing their full support.
  - Other relatives, if the parent(s) are providing their full support.
- Siblings attending **less than half-time, a military academy, or enrolled in a graduate program** will not be counted as “in college”.
- Sibling enrollment status **will be verified each year** in the fall. If you know of a **change to your sibling’s enrollment status** before we request verification, please notify our office at [financial\\_aid@brown.edu](mailto:financial_aid@brown.edu). A change in sibling enrollment status will result in an adjustment to your financial aid award.

	Household Member 1	Household Member 2	Household Member 3	Household Member 4	Household Member 5
<b>Name:</b>					
<b>Relationship to Student:</b>					
<b>Age:</b>					
<b>Enrollment Status and Contribution Information (if applicable)</b>					
Year in School* <b>24-25</b> K-12:					
Year in School* <b>24-25</b> Undergraduate College/University:					
Graduate College/ University <b>24-25</b> : <small>if enrolled, indicate Y</small>					
Part Time:					
Full-Time:					
Name of Institution attending in 2023-24:					
Parent Contribution 2023-24:					
Name of Institution attending in <b>2024-25</b> :					
Parent Contribution <b>2024-25</b> :					
Cost of Attendance <b>2024-25</b> :					

\* Year in School 24-25 for **K-12** should be reported as the grade the household member is in (i.e. 8th, 9th, 10th, 11th, etc.)

\* Year in School 24-25 for **Undergraduate/College University** should be reported as 1st, 2nd, 3rd, 4th, 5th



## 2024-2025 Early Financial Aid Certification

Recruited Athletes Only

**Student Name** (printed): \_\_\_\_\_

- I/We certify that the information reported on this assessment form is true and accurate to the best of my/our knowledge.
- I/We understand this is **not an official application for financial aid**. I/We understand we must complete all financial aid application requirements to receive an official notification of financial aid eligibility. (Financial Aid application requirements are: **CSS Profile, FAFSA, and Non-Custodial Profile (if applicable)**. Please visit our web site in Fall 2023 for more information regarding application requirements.)
- Financial aid eligibility is based on current Brown University policies and on the information you provided to our office. Should Brown University policies change and/or your information regarding household, income, and/or assets differ in any respects from that reported, financial aid eligibility will be revised.

**Student Signature (REQUIRED):** \_\_\_\_\_

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

**Parent Signature (REQUIRED):** \_\_\_\_\_

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

Upload all documents to [Banner Self-Service](#). See [instructions](#) for more details.