Amherst College
Office of Financial Aid

Office of Financial Aid
PO Box 5000
Amherst, MA 01002
Phone: 413-542-2296
Fax: 413-542-2628
Email: finaid@amherst.edu

January Review Information Sheet

Instructions: Complete all required sections. Upload the completed form along with supporting documents in the Financial Aid Portal (FAP) at www.amherst.edu/go/faportal (student login required). **Please be sure to include additional relevant documentation as outlined in each section.**

*This form can be completed in Adobe Reader. To get Adobe Reader, visit *http://get.adobe.com/reader/*.*

Student Name: _____   **Class Year:** _____

Please complete all required sections, and section(s) relevant to your circumstances.

Required sections:
- ☐ Section I: Written Explanation
- ☐ Section II: Change in Income (one-time income, job loss, change in salary, furlough, illness, etc.)
- ☐ Section III: Contact Information, Documentation, and Certification

SECTION I: WRITTEN EXPLANATION

Use this section to explain in greater detail the circumstances for the income reduction in 2023. Provide a detailed explanation and attach appropriate documentation to support circumstances. If you are reporting income for the 2023 year that is not an annual source of income, please describe the source of income. Please describe why this income is not a part of your family's annual income. **Attach additional sheet(s) if necessary.**

SECTION II: REVISED FAMILY INCOME

Family Income for 2023		
	Jan 1, 2023 - Dec 31, 2023	
	Father/Stepfather	Mother/Stepmother
Gross income (wage, business) earned in 2023 (if self-employed, see Business Supplement): Attach year-to-date earning statements, last paychecks, profit/loss statements-businesses, distribution statements,etc		

Other taxable income parent(s) received in 2023		
	Jan 1, 2023 - Dec 31, 2023	
	Father/Stepfather	Mother/Stepmother
Social security benefits -taxable (if any)		
Interest/Dividend Income		
Severance Payment(s)		
Accrued Sick Leave/Vacation Time		
Any other taxable income, such as rental income, capital gains, pension withdrawals, pension payments (please specify) and provide documentation)		

Nontaxable income parent(s) received in 2023		
	Jan 1, 2023 - Dec 31, 2023	
	Father/Stepfather	Mother/Stepmother
Unemployment Benefits (including Pandemic Unemployment Assistance (PUA), Pandemic Emergency Unemployment Compensation (PEUC), Federal Pandemic Unemployment Compensation (FPUC))		
IRA, Keogh, and/or SIMPLE payments		
Payments to tax-deferred pension such as 401(K) or 403(B) (W2 form Box 12; D, E, F, G, H, S) Provide documentation - such as last paycheck with year to date information on withholdings		
Social Security benefits including dependent benefits		
Child Support received		
Public Assistance (Welfare, TANF, WIC, etc.)		
Untaxed pension distributions or withdrawals (excluding rollovers) Provide a copy of the distribution statement		
Other untaxed income/benefits (such as foreign income, worker's compensation, gifts from family members, etc.). *Please specify*		
TOTAL: *(of each column)*	$	$

SECTION III: CONTACT INFORMATION, DOCUMENTATION, & CERTIFICATION

Please provide the email address and phone number at which you can be reached if additional information is needed.

Phone number: _____   Email Address: _____

Additional Documentation Requested:

Please attach the necessary documentation relevant to your family circumstances. Below are examples of documents that are required.

Section II: Revised Family Income:

∗ Parents' final pay-stub(s) showing year-to-date 2023 earnings from all jobs
∗ Termination notice/letter of explanation from employer, including severance statement
∗ Documentation of unemployment benefits from Dept. of Labor
∗ If self-employed, complete the Business Supplement form included

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CERTIFICATION: I certify that this is a true and accurate report of my 2023 income.

This form is being submitted as a supplement to my initial applications for need-based financial aid from Amherst College.

_____   _____
Parent or Guardian's Signature   Date

Upload completed form and supporting documentation to the Financial Aid Portal (FAP) at www.amherst.edu/go/faportal (student login required). Upon completion of our review, the student will receive an email notification to their Amherst email address.