



FINANCIAL AID OFFICE – ROOM L123
2009-2010

MONTHLY RESOURCE AND EXPENDITURE STATEMENT

(If your total monthly income does not meet your total monthly expenses as listed below, please explain on a separate sheet of paper)

Student Name: _____ ID# _____

INSTRUCTIONS: If dependent the questions relate to your parent[s]

- You must complete SECTIONS I, II, III, IV, and V.
- Return the completed form to the Financial Aid Office within two weeks.
- Please be as accurate as possible when listing expenses since these amounts will be used in determining potential eligibility.
- Only list personal expenses [no business expenses please].
- Report the **ACTUAL** monthly dollar amount **paid in 2008** for each expense. If the expenses vary in amount from month to month, provide the monthly average.
- If someone else [relative, friend, social service agency, etc.,] paid the expense on your behalf, indicate “0” **and** explain the resource **in** SECTION III.
- Documentation **must be attached** that verify the amounts given on this form.

→ **SECTION I: 2008 MONTHLY PAID EXPENSES**

MONTHLY EXPENDITURES

MONTHLY AMOUNT PAID

- | | |
|---|----------|
| 1. Home mortgage/rental payments | \$ _____ |
| 2. Property Taxes [if applicable] | \$ _____ |
| 3. Utilities [phone, gas, electric, water, heating, etc.] | \$ _____ |
| 4. Food and household supplies | \$ _____ |
| 5. Transportation Expenses | |
| a. Automobile expenses [monthly payment[s], gas, insurance, maintenance, and/or | \$ _____ |
| b. Monthly train, bus passes or other transportation expenses. | \$ _____ |
| 6. Health Insurance | \$ _____ |
| 7. Child Care | \$ _____ |
| 8. OTHER: _____ | \$ _____ |

[Please list other expenses if applicable]

TOTAL MONTHLY EXPENSES \$ _____

(SEE REVERSE TO CONTINUE)

→ **SECTION II: 2008 MONTHLY RESOURCES**

Please list all the resources and the dollar amounts that are used to meet the expenses listed on the front side. Be sure to include all wages, AFDC, TANF, child support, unemployment benefits, social security benefits, SSI, cash support received, etc. For the listed resources provide documentation confirming the resource and the dollar (\$) amount.
(Examples of acceptable documentation are 2008 Federal Tax Return, W-2 forms, 1099 forms, etc.)

RESOURCES

AMOUNT PER MONTH

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____
- 5. _____ \$ _____

TOTAL MONTHLY RESOURCES \$ _____

→ **SECTION III:** Are any of your expenses on the front of this form paid by another person? YES NO

If yes, complete the information below:

Expenses Paid	By Whom (name)	Relationship to You	Amount per Month
			\$ _____
			\$ _____
			\$ _____
			\$ _____

TOTAL PAID BY OTHER \$ _____

→ **SECTION IV:** Please restate your assets in the spaces provided [enter amount or zero where applicable. Do not leave blank.]

- | | <u>Student (and spouse)</u> | <u>Parent[s]</u> |
|---|-----------------------------|------------------|
| 1. Cash, savings and checking accounts: | \$ _____ | \$ _____ |
| 2. Other real estate and investments: | \$ _____ | \$ _____ |
| 3. Business | \$ _____ | \$ _____ |

→ **CERTIFICATION – SECTION V:** I {WE} certify that the information in Sections I, II, III, and IV above is correct and complete to the best of my {our} knowledge.

Student's Signature: _____ **Date:** _____

Parent[s] Signature [if dependent] _____ **Date:** _____