



Student Name \_\_\_\_\_

Student ID \_\_\_\_\_

**Undergraduate Income & Expense Statement**

In order to fully assess your family’s financial situation, we will need some additional information. Please provide monthly estimates (US Currency) for the following income sources and expenses.

**Household Income Received:**

Mother’s earnings from work: \_\_\_\_\_  
 Father’s earnings from work: \_\_\_\_\_  
 Pension/Retirement: \_\_\_\_\_  
 Unemployment benefits: \_\_\_\_\_  
 Disability: \_\_\_\_\_  
 Social Security: \_\_\_\_\_  
 Child Support/Alimony: \_\_\_\_\_  
 Public Assistance: \_\_\_\_\_  
 Support from family/friends: \_\_\_\_\_  
 Student earnings from work: \_\_\_\_\_  
 Interest/Dividend Income: \_\_\_\_\_  
 Other: \_\_\_\_\_  
 Other: \_\_\_\_\_  
 Other: \_\_\_\_\_

**Household Expenses:**

Mortgage/Rent: \_\_\_\_\_  
 School/Property Tax: \_\_\_\_\_  
 Utility Bills: \_\_\_\_\_  
 Groceries: \_\_\_\_\_  
 Childcare: \_\_\_\_\_  
 Auto payments: \_\_\_\_\_  
 Auto insurance: \_\_\_\_\_  
 Other insurance: \_\_\_\_\_  
 Medical/Dental expenses: \_\_\_\_\_  
 Credit/loan payments: \_\_\_\_\_  
 Tuition payments: \_\_\_\_\_  
 Phone/Cell/Cable: \_\_\_\_\_  
 Other: \_\_\_\_\_  
 Other: \_\_\_\_\_

**Current Asset Information:ParentStudent**

Balance of Cash, Savings &  
 Checking Accounts: \_\_\_\_\_  
 Value of Investments: \_\_\_\_\_  
 Value of real estate (not your home): \_\_\_\_\_  
 Value of business: \_\_\_\_\_

**Household Information:**

Number of family members living in the household? \_\_\_\_\_  
 Number of family members attending college? \_\_\_\_\_  
 Age of the oldest parent (Mother or Father)? \_\_\_\_\_

If you have additional information that you would like to provide our office, feel free to supplement this request. Please do not hesitate to contact our office with any questions you may have.