

# Student Financial Assessment Form (USA)

Institution Name: \_\_\_\_\_

Academic Year: \_\_\_\_\_

## Section 1: Student Information

Full Name: \_\_\_\_\_

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

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Program of Study: \_\_\_\_\_

## Section 2: Household Information

Marital Status: \_\_\_\_\_

Household Size: \_\_\_\_\_

Dependents: \_\_\_\_\_

## Section 3: Educational Costs

Tuition & Fees: \$ \_\_\_\_\_

Books & Supplies: \$ \_\_\_\_\_

Housing/Rent: \$ \_\_\_\_\_

Food: \$ \_\_\_\_\_

Transportation: \$ \_\_\_\_\_

Total Annual Costs: \$ \_\_\_\_\_

## Section 4: Income Information

Employment Income: \$ \_\_\_\_\_

Scholarships: \$ \_\_\_\_\_

Grants: \$ \_\_\_\_\_

Student Loans: \$ \_\_\_\_\_

Total Income: \$ \_\_\_\_\_

## Section 5: Assets

Checking Account: \$ \_\_\_\_\_

Savings Account: \$ \_\_\_\_\_

Investments: \$ \_\_\_\_\_

Total Assets: \$ \_\_\_\_\_

## Section 6: Special Circumstances

\_\_\_\_\_

\_\_\_\_\_

## Section 7: Certification

Student Signature: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_