

FAMILY BUDGET STATEMENT (FBS)

Read the instructions on the back of this sheet prior to completing this form.

PERSONAL INFORMATION

Name	Account Number	Primary Telephone
Street Address	City, State, ZIP	
Name of Spouse	Family Size:	

REFERENCES

You must provide at least two references that do not live with you or with each other.

Reference 1	Relationship	Reference 2	Relationship
Street Address		Street Address	
City, State, ZIP	Home Telephone	City, State, ZIP	Home Telephone

EMPLOYER INFORMATION

Name of Borrower's Employer		Name of Spouse's Employer	
Street Address		Street Address	
City, State, ZIP	Telephone	City, State, ZIP	Telephone
Position	Monthly Income \$	Position	Monthly Income \$

EXPENSES

Expenses	Monthly Payment	Expenses	Monthly Payment
Food	\$	Federal Student Loan Payments	\$
Housing	\$	Child Support <i>(If deducted from pay, write see paystub)</i>	\$
Utilities (Electricity/ Gas/ Water, Sewer & Garbage)	\$	Alimony <i>(If deducted from pay, write see paystub)</i>	\$
Basic Communication (Basic Telephone & Internet)	\$	Life Insurance <i>(If deducted from pay, write see paystub)</i>	\$
Car Payment	\$	Medical Insurance <i>(If deducted from pay, write see paystub)</i>	\$
Car Insurance	\$	Necessary Medical/Dental Expenses	\$
Gasoline Expense	\$	Federal Taxes Owed	\$
Number of Vehicles		State Taxes Owed	\$
Dependent Care	\$	<i>Supporting documentation must demonstrate a required monthly payment amount.</i>	
Home Insurance	\$	Total Monthly Expenses	

I certify that the information on this form is true and correct. I authorize UHEAA to contact me regarding my request or my loan(s), including repayment of my loan(s), at the number that I provide on this form or any future number that I provide for my cellular telephone or other wireless device using automated telephone dialing equipment or artificial or prerecorded voice or text messages.

Borrower's signature

Date

INSTRUCTIONS FOR COMPLETING THE FAMILY BUDGET STATEMENT (FBS)

Family Size

Your family size includes you, your spouse, and your children (including unborn children who will be born before the end of the calendar year), if the children will receive more than half their support from you. Your family size includes other people only if they live with you now, receive more than half their support from you now, and will continue to receive this support from you for the year for which you are certifying your family size. Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, and payment of college costs.

Income Documentation

You must provide documentation of your **household** monthly income. You must provide income documentation for your spouse if your spouse contributes to your household income and/or pays any portion of the expenses you claim on the FBS. Acceptable documentation may include:

- One month's paystubs
- W-2s for the most recently completed tax year
- A letter from your employer, on company letterhead, confirming your monthly income

Note, we recommend you provide paystubs if available. Providing your paystubs will allow us to review your total financial circumstance using your net income. If paystubs are not provided, your total financial circumstance will be reviewed using your gross income.

If you are receiving any type of assistance, please provide written verification of your eligibility to receive that assistance and include the monthly amount you receive.

Expense Documentation

You must provide supporting documentation to verify all expenses you claim on the FBS. For example, a copy of your mortgage statement, copies of your utility bills, etc. If documentation is not provided for an expense, or if the documentation you provide is not sufficient, you may be asked to provide additional supporting documentation.

For expenses, please enter the required monthly payment in the "Monthly Payment" column. **Do not include past-due amounts or outstanding balances in this column. If you have not made arrangements to pay a past-due amount or outstanding balance, UHEAA will not consider the expense in our review.**

EXAMPLE:

Expenses	Monthly Payment
Rent or Mortgage	\$ 600.00
Food	\$ 200.00
Electricity	\$ 50.00
Gas	\$ 30.00

Additional Information You Should Be Aware Of

All documentation must be dated in the last 90 days. UHEAA has the right to request additional documentation as necessary. Failure to complete the form in its entirety may result in your request being denied. We recommend submitting the completed FBS and required supporting documentation at one-time.

You should follow up with our office to confirm your completed form and supporting documentation have been received. Submitting the FBS and supporting documentation does not guarantee your request will be approved.