

Income/Expense Budget Form – Financial Independence

Complete this form if you are an undergraduate student under 24 and claim to be financially independent.

List all of your expenses for one year ending on the applicable [Residency Determination Date \(RDD\)](#). As an example, the RDD date for fall 2022 is August 24, 2022. You must submit 12 months of documentation that is dated prior to the fall 2022 RDD date.

You may review the rules and regulation for [Financial Independence](#) in the [UC Residence Policy and Guidelines](#).

You are **required** to submit copies of state and federal tax returns, supporting W-2 and/or 1099 forms, CA Driver's License or CA State ID, proof of housing (rental contracts and proof of housing payments), 12 months of utility payments, bank and credit card statements, and financial documentation for loans, trusts, college accounts, and any other documents that may be requested.

Expenses	2021-2022 Calendar Year
Housing (Rent/Mortgage)	
Educational Fees	
Book & Supplies	
Transportation (Gas/Insurance)	
Utilities (Phone/Water/Cable)	
Food	
Clothing & Accessories	
Medical Expenses (Insurance)	
Misc	
Other	
TOTAL EXPENSES:	

Income	2021-2022 Calendar Year
W2's (Federal & State Taxes)	
Financial Aid Awards	
Loans & Scholarships	
Other (explain)	
TOTAL INCOME:	