

SAMPLE Budget Form – Financial Independence

Use this form to list all of your expenses and provide information for one year ending on the applicable [Residency Determination Date \(RDD\)](#). As an example, the RDD date for fall 2019 is August 28, 2019 which means that all documents need to be dated prior to this 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, tax transcripts, supporting W-2 and 1099 forms, proof of housing (rental contracts and housing payments), 12 months of checking, savings, and credit card statements, and financial documentation for loans, trusts, college accounts, and any other documents that may be requested.

Expenses	Current Year	Previous 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	Current Year	Previous Year
W2's (Federal & State Taxes)		
Financial Aid Awards		
Loans & Scholarships		
Other (explain)		
TOTAL INCOME:		