

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 fall 2021 August 25, 2021 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, CA Driver's License or CA State ID, proof of housing (rental contracts and housing payments), proof of utility 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	2020 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	2020 Calendar Year
W2's (Federal & State Taxes)	
Financial Aid Awards	
Loans & Scholarships	
Other (explain)	
TOTAL INCOME:	