



## Form B – Financial Information

*Only one completed copy of Form B is required even if you are applying for multiple bursaries. You must complete Form B to be eligible for bursaries, which are awards that assess financial need to determine eligibility. Please attach your 2009/2010 Notice of Assessment if you have applied for a student loan.*

Personal information is collected under the authority of the Freedom of Information and Protection of Privacy Act and the Federal Taxation Act. If you have questions about the collection or use of this information please contact the Awards Advisor at (403) 284-7705.

### Personal Information:

Name: (print) \_\_\_\_\_ Phone #: \_\_\_\_\_

ACAD #: \_\_\_\_\_ Current Program: \_\_\_\_\_ Year of Study: \_\_\_\_\_

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

**Citizenship:**  Canadian Citizen  Permanent Resident/Landed Immigrant  International Student

Have you lived in Alberta since birth?  Yes  No, but since \_\_\_\_\_ (month/year)

Name of High School: \_\_\_\_\_ Location of school (city/province) \_\_\_\_\_

What year did you graduate from high school? \_\_\_\_\_

### What is your marital status this academic year?

Single  Married/Common Law (no children)  Married/Common Law (with children)

Separated/Divorced (no children)  Single Parent  Widowed

### Dependent/Independent Information

*Please answer yes or no to the following questions. If you answer yes to any of the following questions you do not need to fill out the Parental Income Section.*

Are you married/common law?  Yes  No Do you have dependent children?  Yes  No

Have you been out of high school for 4 years or more?  Yes  No

Since leaving high school have you been available for full-time work for two periods of 12 consecutive months. (2 years)  Yes  No

### Accommodations

Where will you live during this academic year?  Parent or Relative's Home  Other

Is your parents/relative's home within a reasonable commuting distance from the Alberta College of Art + Design?

Yes  No

If not, how many kilometers do your parents live from school? \_\_\_\_\_

What is the estimated travel time? \_\_\_\_\_

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**Parental Income**

*Complete this section if you replied no to all of the above questions.*

Are your parents separated or divorced?  Yes  No

If yes, which parent have you lived with most recently? \_\_\_\_\_

Is there a step-parent living in this household?  Yes (if yes indicate his/her annual income below)  No

a) What is the occupation of your father/step-father? \_\_\_\_\_

What was his annual income last year (see line 150 of his income tax return)? \_\_\_\_\_

If income is expected to be less than last year, provide this year's estimated annual income.

\_\_\_\_\_

b) What is the occupation of your mother/step-mother? \_\_\_\_\_

What was her annual income last year (see line 150 of her income tax return)? \_\_\_\_\_

If income is expected to be less than last year, provide this year's estimated annual income.

\_\_\_\_\_

d) What is the number of children in the family (including you)? \_\_\_\_\_

and what are their ages? \_\_\_\_\_

How many of those children (including yourself) will be attending a post-secondary school during this academic year? \_\_\_\_\_

**Spousal Income**

What is the occupation of your spouse? \_\_\_\_\_

What was his/her annual income last year? (See line 150 of his/her tax return) \_\_\_\_\_

If expected to be less in the upcoming year, provide this year's estimated annual income.

\_\_\_\_\_

If your spouse is a student, show their earnings for:

Summer \_\_\_\_\_ School Year \_\_\_\_\_

**Dependent Information**

How many dependent children reside with you? \_\_\_\_\_ Ages: \_\_\_\_\_

Please list any other dependents \_\_\_\_\_ Ages: \_\_\_\_\_

**Assets**

a) Do you and/or your spouse own your own home?  Yes  No

House value: \_\_\_\_\_ Amount owing: \_\_\_\_\_

Date of purchase: (month/year) \_\_\_\_\_ Monthly payment: \_\_\_\_\_

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**Investments**

List the current value of you and your spouse’s investments (RRSP’s, GIC’s, stocks, bonds, mutual funds, trust accounts, etc. but do not include RESP amount)

Investment Type	Value	RRSP fund?(please circle) Yes/No
_____	_____	Yes/No
_____	_____	Yes/No
_____	_____	Yes/No

**Government Loans, Grants and Bursaries**

Did you apply for student loan/grant funding for the current academic year?  Yes  No

If yes, how much funding (including grants, loans and bursaries) will you be receiving for the current academic year? \_\_\_\_\_

If you did not apply, please give the reason why:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is your total student loan debt to date, including the amount awarded for the current academic year?

\_\_\_\_\_

**Student Line of Credit (bank loan)**

Did you apply for a student line of credit for the current academic year?  Yes  No

If yes, indicate credit limit. \_\_\_\_\_

What is your total outstanding amount? \_\_\_\_\_

If you did not apply for a bank loan, please explain.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Expenses/Resources

Please complete the following budget for the current academic year. If you are married or common-law the budget will include your entire household. Fill in every question as this will allow us to correctly assess your financial need.

**NOTE: Incomplete forms will not be considered.**

**Living Costs:**  
(dollars/month while in school)

**Resources:**  
(dollars/month while in school)

Rent/Mortgage	\$	Expected Work Income	\$
Food/Clothing/Personal Care	\$	Spouse's Monthly Income	\$
Utilities/Phone/Gas	\$	Parental Contribution	\$
Child Care Expenses	\$	Income from Benefits (please list type of benefit, such as orphan's or CPP)	\$
Transportation	\$		\$
Exceptional Expenses: <i>(if the following costs are not covered by your insurance plan)</i> Medication Costs	\$		\$
Dental costs	\$	Indian and Northern Affairs/ Band Funds (please list type)	\$
Glasses/Contacts	\$		\$
			\$
Spouse's Student Loan Payments	\$	Savings (excluding investments) at start of winter semester.	\$
Child Support Payments	\$		
Other Costs: (such as school supplies) – please describe	\$	Scholarships/Bursaries (not issued with your student loan)	\$
	\$	Other Income (excluding income from student loan)	\$
	\$		\$

**How do you expect to meet the shortfall between expenses and resources?**

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**Describe any extenuating circumstances affecting your financial situation. (Please attach no more than one page if additional space is required.)**

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**Signature (in ink):** \_\_\_\_\_

**Date:** \_\_\_\_\_