Travel Financial Need Assessment Form

Graduate Student Fall/Winter 2014-2015

Deadline dates are June 30th for Fall or Winter travel, October 1st for Winter travel.

- Submit ONE Need Assessment Form (N.A.F) per travel period for all travel awards that state "financial need" as one of the criterion.
- Use the award search tool to identify travel awards that require an application/letter in addition to the N.A.F: www.uoguelph.ca/registrar/studentfinance/index.cfm?app=awards

Name:_____

Student ID #:_____

Date of Birth: YY/MM/DD:_____

Department: _____

Program (MSc, PhD, etc.): _____

Semester #:_____

Marital status: _____

☐ Single

☐ Married*

☐ Sole Support Parent

*Is your partner a student registered at the University of Guelph? If YES please provide their name and student identification number.

Partner's name: _____

Student ID#:_____

Number of children that live with you, if any:

____ 0-11yrs

____ > 12 yrs.

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Residence Status

What is your current citizenship status?

- ☐ Canadian citizen
- ☐ Permanent resident

Please check one statement that best describes your current situation:

- ☐ You have always lived in Ontario, or Ontario is the last province you resided in for 12 consecutive months without being a full time post-secondary student.
- ☐ You reside in Ontario and you have lived in Canada for less than 12 months
- ☐ Ontario is the last province your parent(s), step-parent(s), legal guardian(s), or official sponsor(s) resided in for at least 12 consecutive months immediately before the last day of the month that classes begin for the most recent period of full time studies.
- ☐ You reside in Ontario and you and your parent(s), step-parent(s), legal guardian(s), or official sponsor(s) resided in Canada for less than 12 months.

If you are married or in a common-law relationship, you may select from one of the following two choices:

- ☐ Your spouse has always resided in Ontario or Ontario is the last province your spouse resided in for 12 consecutive months without being a full time post-secondary student.
- ☐ You reside in Ontario and you and your spouse have lived in Canada for less than 12 months.

Or

- ☐ You now live in Ontario, but none of the above statements applies to you

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Sources of Financial Assistance:

Complete section '1' or '2', whichever is applicable.

When did you last attend/complete high school (HS) on a full time basis? (Month/year) _____/_____

1) If you have NOT been out of high school for 4 complete years, complete this section

Parents' Marital status:

- ☐ Married
- ☐ Separated
- ☐ Divorced
- ☐ Widowed
- ☐ Single

(if this is anything other than 'Married", provide the income of the parent with whom you reside)

Father's 2012 income as reported on line 150 of Income Tax Return $_____

Mother's 2012 income as reported on line 150 of Income Tax Return $_____

Number of dependent children in your family including yourself (dependent is defined as pre-school/grade school & high school children and children in post-secondary studies that have NOT been out of high school more than 4 years.) $_____

Number of dependent children registered in full time post-secondary studies for the 2013-14 year (including yourself) $_____

Enter your pre-study income (gross income 16 weeks prior to the start of your study period) $_____

2) If married or sole support parent and/or have been out of high school for 4 complete years, complete this section.

Partner's 2012 income as reported on line 150 of Income Tax Return $_____

The number of children in each of the following age category: _____ 0-11 years

_____ >12 years or older

Enter your pre-study income (gross earnings for the 16 week period prior to your study period) $_____

For office use only ☐ **On OSAP** **or** ☐ **Max OSAP** ☐ **or Not OSAP**	**Initial/Date**	**$**
Cheque Requested:	**Special Requests:**	

Income/Resources

Bank balance on September 1 $_____

Parents/Partner's financial contribution towards your studies $_____

Awards/Bursaries/Scholarships (known) $_____

Graduate Teaching or Research Assistantships (expected) $_____

Employment income during your 2013-14 study period. Will this be work study income? $_____

☐ Yes ☐ No

Total OSAP assistance (estimate) $_____

Total Out of Province or Out of Country Loan Assistance (indicate from where i.e. BCSAP) $_____

Student bank loan/Personal Line of Credit 9available balance only) $_____

Government Income (specify) _____ $_____

Sponsorship Funding (specify)_____ $_____

Investments, e.g. GICs, mutual funds, bonds, RRSP's, RESP's etc. (specify) $_____

Total Financial Resources (Report on Line 1 below) $_____

Expenses:

Choose the ONE best option that explains your academic plans

☐ I am Single, will be registered full time in a graduate program and will live away from home. $_____
Fall AND Winter (Claim $16,410)
Fall or Winter (one semester only) (Claim$8,205)

☐ I am Single, will be registered full time in a graduate program and will live at home with parents/guardians. $_____
Fall AND Winter (Claim $10,770)
Fall or Winter (one semester only) (Claim$5,385)

☐ I am married or a sole support parent and will be registered full time in a graduate program. $_____
Fall AND Winter (Claim $25,220)
Fall or Winter (one semester only) (Claim$12,610)

☐ Dependent children aged 0-11 years or disabled children >/= 12years, claim $2,000 per child

_____ x_____x $2000 = _____ $_____
(Number of children 0-11/>12 & disabled) (no. of semesters 1 or 2) (claim this amount)

☐ For dependent children 12 years and older, claim $500 per registered semester per child

_____ x_____x $500 = _____ $_____
(Number of children 12yrs & older) (no. of semesters 1 or 2) (claim this amount)

☐ Other expenses: Do not include tuition, books, or living costs. Do include additional fees that may apply specifically to your program, Medical/Dental expenses (attach receipts), etc.
Note: You may include travel costs if you are participating in a University of Guelph approved travel Program (if you claim this, your application must be accompanied by a Travel Grant Application For consideration of a bursary and travel award) (Attach a separate letter of explanation) $_____

Total Expenses (report on Line 2 below) $_____

Financial Need

Line 1 (from Resources) $_____

Line 2 (from Expenses) $_____

Financial Need: Subtract Line 2 from Line 1 $_____

Comments: (attach a separate sheet if necessary)

I certify that the information contained in this application is complete and true. I agree to provide Student Financial Services with any documentation necessary to verify the above noted information. I understand that failure to provide such documentation may affect current or future eligibility for the bursary program. I further understand that should my eligibility for the bursary program be terminated, I may be required to refund any monies I have received from the University under the bursary program.

X_____
Signature Date

Completed forms can be dropped in the Red Box, 3rd Floor, University Centre in Student Financial Services or scanned and emailed from your University email account to awards@uoguelph.ca or faxed to (519) 823-9421