

FINANCIAL NEED PLANNING FORM

Graduate School Educational Opportunity Fund Scholarship

(Applicants for **Fall** consideration must base information on the previous tax year. Applicants for **Spring** consideration must base information on the tax year prior to the most recent tax year.)

Funds are requested for the following semester/year (check only one):

Fall ____ Spring ____ Year ____

Anticipated semester enrollment hours: ____

(must be a minimum of 3 hours and cannot exceed 8 hours)

Section I: STUDENT INFORMATION

1. Name _____
2. Home address _____
3. City _____ State _____ Zip _____
4. myWSU ID _____
5. Date of birth (mm/dd/yy) _____

Section II: HOUSEHOLD INFORMATION

6. Marital status: Single ___ Married ___ Separated ___ Divorced ___ Widowed ___
7. Number of family members: ____
8. Number of family members in college: ____

Section III: INCOME, EARNINGS, AND BENEFITS

9. Monthly Veteran Benefits (student only): \$ _____
10. Number of months expected to receive Veteran Benefits: ____
11. Student/Spouse type of tax form filed:
1040EZ/1040A ____ 1040 ____ Not required to file ____

- | | <u>Student/Spouse</u> |
|--|-----------------------|
| 12. Number of exemptions claimed: | # _____ |
| 13. Adjusted Gross Income: | \$ _____ |
| 14. Tax Paid (leave blank, computer will calculate): | \$ <u>XXXX</u> |
| 15. Income from work (Student): | \$ _____ |
| 16. Income from work (Spouse): | \$ _____ |

Untaxed Income:

- 17. Earned Income Credit: \$ _____
- 18. Social Security Benefits: \$ _____
- 19. ADC, AFDC, TANF: \$ _____
- 20. Child support received: \$ _____
- 21. Other untaxed income: \$ _____
(Workers comp., untaxed pensions, deductible
IRA/KEOGH/401K payments, tax exempt interest, etc.)
- 22. Child support payments & taxable financial aid: \$ _____

Section IV: **ASSET INFORMATION**

- 23. Value of cash, savings, and checking accts. \$ _____
- 24. Other real estate/investment value: \$ _____
(Stocks, bonds, money market funds, etc. excluding home)
- 25. Other real estate/investment dept (excluding home): \$ _____
- 26. Business value: \$ _____
- 27. Business debt: \$ _____
- 28. Farm value (investment farms only): \$ _____
(Exclude if you live on farm)
- 29. Farm debt: \$ _____

Section V: **SIGNATURES**

I (We) understand that the above information will be used to ESTIMATE eligibility for need based assistance. I (We) understand that the financial aid application process will use actual income figures based on the appropriate tax year information from the student, spouse, and parents. Any changes in income and assets may affect this estimation.

Student's signature	Date	Spouse's signature	Date
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Please submit this form along with your cover letter (see instructions) to:

(U.S. Mail)
Graduate School
Wichita State University
1845 Fairmount
Wichita, KS 67260-0004

(WSU Campus mail)
Graduate School, box 4

(in person delivery)
Graduate School
107 Jardine Hall

Application material deadlines:

for Fall awards: 1st Monday in June
for Spring awards: 1st Monday in October