

Emergency Financial Needs Assessment Form

Section 1: Personal Information

Last name:	_____	First name:	_____
Student #:	_____	Rotman email:	_____
Program:		Year of entry:	
Legal status:		I have a PSLP loan with:	
Marital Status:		OSAP/Government loans:	
Spouse/partner's employment status:		Will your spouse/partner be living with you during the academic year?	
Number of dependents* living with you:	_____	Ages:	_____

* List only dependents who will be living with you **full-time** during the academic year. Eligible dependents include children **under the age of 16 years and elderly parents. Children 16 years of age or older must be full-time students or disabled in order to be considered dependent**

Ontario Residency: Some financial aid is provided to specifically support Canadian students who are Ontario residents. Ontario residency is defined as a Canadian Citizen or Permanent Resident and satisfies one of the following criteria (please check the ONE that is applicable to you):

Section 2: Budget Information

Please provide the following amounts for the full twelve-month period of **September 1 to August 31**.

Expected Resources	Amount (\$CDN)	Expected Expenses	Amount (\$CDN)
Net Income (Including Partner/Spouse)		Rent/Mortgage	
Savings (Cash in bank only)		Utilities (Telephone, Heat/Hydro, Cable and Internet)	
Third Party/Employer Sponsorship (Please explain in Section 3)		Food/Groceries	
Confirmed Loans and Grants from OSAP (or other provincial/federal student loan programs for year.)		Daycare (If applicable)	
Confirmed Annual Scholarships/Awards		Local Transportation	
Other income (ie. Child Support, RESP, Family Support) (Please explain in Section 3)		Miscellaneous expenses (Please explain in section 3)	
TOTAL RESOURCES		TOTAL EXPENSES	
TOTAL NEED: (ie. Resources - Expenses)			

Section 3: Statement

Please provide a statement explaining your financial need and your financial plans to address this need in addition to support you are seeking from the Rotman School.

Section 4: Declaration and Signature

I hereby certify that the information provided on this Financial Needs Assessment Form (and in the attached, if applicable) is, to the best of my knowledge, true and complete.

I understand that misrepresentation on my financial circumstances or legal status as a Canadian Citizen or Permanent Resident is grounds for the University of Toronto and the Rotman School of Management to revoke financial assistance provided during the duration of the program. Further, any financial assistance already provided will be repaid to the Rotman School of Management in full.

I understand that additional documentation may be required (e.g. documentation such as rent receipts; proof of mortgage payments; OSAP (or other governmental loan programs) assessments; receipts for daycare (if applicable); income tax returns, etc.).

I understand that if I am awarded funding, funds may be directed first to outstanding tuition balances, with any remaining funds issued to me in the form of direct deposit.

Applicant Signature

Date

Note: unsigned applications cannot be considered.

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