**Applicant’s Statement of Anticipated Financial Needs and Requested Funding**

**Richard and Elizabeth Kasper Seminary Fund, Inc.**

In the space below, please list your anticipated expenses and income for the next semester or quarter(s), \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_.

Anticipated tuition expense $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Anticipated books and other expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TOTAL Education Expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(A)

Anticipated contributions to educational expenses:

From your income and other financial resources

(including family): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

From other scholarships, grants, etc. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TOTAL Contribution to Education Expense$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (B)

**Education Expense Shortfall (A less B) $(\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)**

I declare that I am in need of financial assistance and would otherwise have to borrow additional money to finance my education.

**Applicant’s Signature** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Applicant’s Financial Statement - Net Worth**

**Richard & Elizabeth Kasper Seminary Education Fund**

**Assets (What I/We Own)**

Bank Accounts, Retirement Accounts, CD’s, Stocks, etc. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Vehicle(s) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Retirement Plans, IRA’s, etc. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Assets $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TOTAL Assets = $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(A)**

**Liabilities (What I/We Owe)**

Mortgage Loan(s) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Auto Loan(s) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Credit Card Debt\* $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Loans or Debts $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TOTAL Liabilities** **= $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (B)**

**Total Assets (Line A) – Total Liabilities (Line B) = Net Worth**

**$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ - $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ = $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Applicant’s Monthly Income and Expenses Worksheet**

**Richard & Elizabeth Kasper Seminary Education Fund**

The following is a worksheet to help you understand your monthly financial habits and how you may be able to contribute to your own education.

**Income:**

Average Monthly Earnings (net, after taxes) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Interest, Investment and Other Income (net, after taxes) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Gifts, Trust Fund Distributions $\_\_\_\_\_\_\_\_\_\_\_\_\_

**TOTAL Income $\_\_\_\_\_\_\_\_\_\_\_\_\_ (A)**

**Expenses**:

Tithe $\_\_\_\_\_\_\_\_\_\_\_\_\_

Housing (mortgage payment or rent) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Utilities, Renters/Homeowners Insurance, HOA’s, etc. $\_\_\_\_\_\_\_\_\_\_\_\_\_

Food and household supplies $\_\_\_\_\_\_\_\_\_\_\_\_\_

Automobile (car payments, gas, insurance, repairs) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Health (doctor, dentist, gym, etc.) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Misc. Insurances (health, life, medical) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Debt Service (credit cards, other loans) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Obligations (children tuition, out-of-home care, etc.) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Entertainment, Clothing, Recreation, Dining Out, etc. $\_\_\_\_\_\_\_\_\_\_\_\_\_

Gifts, Incidentals, Misc. $\_\_\_\_\_\_\_\_\_\_\_\_\_

**TOTAL Expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_ (B)**

1. **- (B) = Monthly Income Over Expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Or**

1. **- (A) = Monthly Expenses Over Income $(\_\_\_\_\_\_\_\_\_\_\_\_\_)**

*This form may be requested each funding period.*

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