



## GRADUATE STUDENT BUDGET APPEAL

Student's Name (please print) \_\_\_\_\_ Student ID# \_\_\_\_\_ Award Year \_\_\_\_\_ E-Mail Address \_\_\_\_\_

The Graduate Financial Aid Office calculates your financial assistance eligibility based on a combination of tuition, housing, meal and living expenses. We encourage you to live frugally and to budget your expenses. However, if needed, we may be able to increase your annual budget in anticipation of certain expenses that are not a part of the standard student budget. Such an increase may only change your loan eligibility. **Please itemize additional expenses below** (attach separate sheet if needed) **and attach required documentation.**

### Additional Expenses<sup>1, 2</sup>

**Please note: Expenses that will be considered are those that are paid, not billed.**

Books & Supplies<sup>4</sup> (in excess of \$595/quarter for full-time, \$393 for half-time, and \$196 for those below half-time)

Car Insurance Premium, Registration, Maintenance, Roundtrip mileage to & from campus/Campus Parking (in excess of \$1,891 for 9-month or \$2,521 for 12-month enrollment)

Childcare Costs (maximum of \$1,440/month; only allowed if single parent, or spouse is enrolled in school or employed at least part-time)

Computer Purchase (up to \$1,500 once during academic career)

Dental, Medical, and Vision Expenses not covered by insurance (non-elective cosmetic, medically necessary). Can include prescription drugs and other on-going student expenses on a quarterly basis.

Health Insurance Premium

(in excess of student basic coverage). Can include unemployed or underemployed spouse & dependent children. Can include Dependent Health Services Fees.

Rent<sup>5</sup>, Mortgage, Condo Fees, Renter's or Homeowner's Insurance, and Parking at home (in excess of \$1300/month)

Round-trip Ticket Home or for PhD Research<sup>6</sup> (in excess of \$400: one coach-class, 30-day advance ticket per school year)

Other (Additional tuition/fees; disability-related; loan fees, etc.): \_\_\_\_\_

### Required Documentation<sup>3</sup>

(Please photocopy. Do not submit originals.)

ALL receipts<sup>4</sup>.

Insurance bill/contracts/receipts

Contract: if no contract, need cancelled check showing amount paid.

Signed copy of receipt for purchase.

Bill itemizing the amount of insurance & what you must pay.

Statement, if other than UChicago.

☐ Check if UChicago insurance

Lease, rental agreement (signed), or mortgage statement, and two cancelled checks insurance bill

Airline ticket or paid itinerary. PhD students also see requirements below.

Provide official documentation.

### Total Excess Annual Expense<sup>1, 2</sup>

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Loan Amount You're Requesting \$ \_\_\_\_\_

☐ Direct Unsubsidized ☐ GradPLUS ☐ Alternative

- 1) If eligible, loans are awarded in the order indicated.
- 2) Complete an online GradPLUS Application (only need to complete once) or an application for the Alternative loan, if you've already received the annual maximum Unsubsidized Federal Stafford loan totaling \$20,500.

<sup>1</sup> Graduate Financial Aid reserves the right to not allow an expense without proper documentation or that exceeds the standard allowance by greater than 15% (unless indicated above); and to request documentation, in addition to that listed on this form, to support your appeal. **There are limits on the amount we can allow for certain expenses.** Unless indicated, only expenses incurred by the student are covered.

<sup>2</sup> Expenses we cannot cover include (but are not limited to) credit card bills, car payments, job search costs, moving & relocation costs, elective cosmetic medical & dental, and optional expenses unrelated to your course of study. Please refer to <https://financialaid.uchicago.edu/graduate-students> for more detailed information.

<sup>3</sup> **Required documentation must be official and must include your name. Quotes are not acceptable documentation. Please speak with a counselor in our office regarding appropriate documentation or items not listed above and their admissibility.**

<sup>4</sup> Provide a copy of the course syllabus or book list for each of your courses, along with **ALL receipts totaling at least \$596, \$394, and \$197 plus the excess costs.**

<sup>5</sup> We can only consider the student's portion of the rent for single students or those with roommates. **If you are not the sole lease holder, in addition to your lease, we require copies of cancelled checks to confirm your monthly rent payment and may require additional documentation, once reviewed.**

<sup>6</sup> A PhD student, performing research during an officially enrolled quarter (in eligible status), whose grant does not cover all of their costs, may apply for travel and up to \$1,366 lodging reimbursement. Attach a copy of paid airline ticket/itinerary and/or paid hotel bill. Also provide documentation of all research grant receipts and a letter directly from the committee chair (preferred) or his/her department, which substantiates your request. Students studying abroad must provide country of study, conversion rate used, currency type and the source and amount of grants/scholarships/other assistance you expect to receive to offset these costs.

**Please note: Appeals will be taken into consideration at the discretion of the Office of Graduate Financial Aid. Submission does not guarantee approval.**

*I certify that I agree with the terms set forth in this document and that all information I have supplied is accurate.*

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

(This form requires a physical signature. Digital signatures cannot be accepted.)