



Student Financial Services  
 University of Pennsylvania  
 005 Franklin Building  
 3451 Walnut Street  
 Philadelphia, PA 19104-6270  
 http://sfrs.upenn.edu

# Application for Financial Aid

## Canadian Citizens

Academic Year 2023-2024

**Complete in U.S. dollars**

**SECTION A - STUDENT INFORMATION**

Last Name  First  Initial  Birthdate

Penn I.D.#  Email

Home Address  
      
 Street City State Zip Code Phone #

Parent #1 Preferred Daytime Phone #  Parent #2 Preferred Daytime Phone #

1. I am applying as a:  Freshman or  Freshman Transfer

**SECTION B - ESTIMATED RESOURCES**

2. List the amounts you and your family expect to contribute toward your educational and living expenses for 2023-2024 from these sources: (Do not include anticipated financial aid)

From parent(s) income/assets	\$	<input type="text"/>	Complete in U.S. dollars
From student's assets	\$	<input type="text"/>	
Child support/non-custodial parent contribution	\$	<input type="text"/>	
Outside scholarships	\$	<input type="text"/>	
Grants from parent(s) employer	\$	<input type="text"/>	
Other	\$	<input type="text"/>	
Specify			
<b>Total</b>	\$	<input type="text"/>	

**SECTION C - HOUSEHOLD INFORMATION**

3. How many family members will your parents support in 2023-2024?   
 Include yourself and your parents. List their names and provide information about them in #6.
4. Of the number in #3, how many will be in college at least half-time for at least one term in 2023-2024?   
 (Include yourself)
5. How many parents will be in college at least half-time 2023-2024?  
 (Check only one box)  
 Neither parent  One parent  Both parents
6. What is your parents' province of legal residence?

**7. List all those in your household who will be dependent upon (i.e. supported by) your parent(s) in 2023-2024. Include yourself, your parent(s), (or your custodial parent if divorced/separated), (step) brothers, and (step) sisters, and other relatives.**

**a.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-24  
 Public  
 Private  Check if Full-Time  
 College

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**b.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-24  
 Public  
 Private  Check if Full-Time  
 College

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**c.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-24  
 Public  
 Private  Check if Full-Time  
 College

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**d.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-24  
 Public  
 Private  Check if Full-Time  
 College

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**e.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-24  
 Public  
 Private  Check if Full-Time  
 College

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**f.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-24  
 Public  
 Private  Check if Full-Time  
 College

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**g.**    Check if living with family

Name Age

Name of Present School or College 2022-23 Year in School 2022-23 Tuition and Fees 2022-23 Room and Board 2022-23 Scholarships or Gift Aid 2022-23 Parental Support Toward Tuition 2022-23 Name of Institution to be Attended 2023-24

Type of Institution 2023-2024  
 Public  
 Private  Check if Full-Time  
 College

**8. Parents' Information**

Parent #1  
 Legal guardian  Other (Explain Section K)

Name  Age

Self-employed  Unemployed - Date

Occupation

Employer  Years

Work Telephone

Email

Parent #2  
 Legal guardian  Other (Explain Section K)

Name  Age

Self-employed  Unemployed - Date

Occupation

Employer  Years

Work Telephone

Email

**9. Divorced, Separated, or Remarried Parents:**

To be answered by the parent who completes this form if the student's natural or adoptive parents are divorced, separated, or remarried.

a. Year of separation  Year of divorce

b. Has either natural parent remarried?  Parent #1 / year   Parent #2 / year

c. Non-custodial parent's name:

Home address

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street	City	State	Zip Code	Phone #

Occupation  Employer

d. According to court order, when will support for the student end? Month  Year

e. Who last claimed the student as a tax exemption?  Year

f. How much does the non-custodial parent plan to contribute to the student's education for the 2023-2024 school year? \$

g. Is there an agreement specifying this contribution for the student's education?  Yes  No

**SECTION D - PARENTS 2021 INCOME AND BENEFITS IN U.S. DOLLARS****10. Taxable Income**

(The line references below are for 2021. Use the corresponding lines from 2021 tax forms).

- a. Wages, salaries, tips: Parent #1 / Step Parent #1 (T1 line 101) → \$
- b. Wages, salaries, tips: Parent #2 / Step Parent #2 (T1 line 101) → \$
- c. Dividends-combination of both parents (T1 line 120) → \$
- d. Interest income-combination of both parents (T1 line 121) → \$
- e. Business Income (T1 lines 122 +135 -143) → \$
- f. Rental Real Estate Income (T1 line 126) → \$
- g. Income from Pension (T1 lines 114 - 117) → \$
- h. Any other taxable income not included above (Please provide an itemized breakdown in Section K) → \$
- i. Total (combination of both parents 10a through 10h) → \$

**11. Nontaxable Income & Benefits: (Explain sources in Section K)**

- a. Housing, food, and other living allowances provided by employer → \$
- b. Tax exempt interest and dividend income → \$
- c. Other → \$

**12. Total Taxable & Nontaxable Income & Benefits: (add amounts in 9f and 10)** → \$ **13. Credits**

- a. Pension Plan Contributions (T1 line 308 or 310) → \$
- b. Employment Insurance Premiums (T1 line 312) → \$
- c. Allowable Medical Expenses (T1 line 332) → \$

**14. Taxes**

- a. Canadian Net Federal Tax (T1 line 420) → \$
- b. Provincial Tax (T1 line 428) → \$
- c. Total Taxes (13a + b should equal T1 line 435) → \$

**SECTION E - PARENTS' 2021 EXPECTED INCOME & BENEFITS IN U.S. DOLLARS**

If expected total income and benefits will differ from the 2021 total income and benefits by \$3,000 or more, explain in Section K.

- 15. 2022 income earned from work by Parent #1 or Step Parent #1 → \$
- 16. 2022 income earned from work by Parent #2 or Step Parent #2 → \$
- 17. 2022 other taxable income (Source of income) → \$
- 18. 2022 nontaxable income and benefits → \$

**SECTION F - PARENTS' EXPENSES IN U.S. DOLLARS**

- 19. Annual child support paid by the parent(s) completing this form → \$
- 20. Annual repayment of educational loans borrowed by parents:
  - a. For parents' education → \$
  - b. For siblings, not currently enrolled (do not include student loans) → \$
- 21. Annual elementary, junior high school, and high school tuition paid for all dependent children
  - a. Amount paid → \$
  - b. For how many dependent children? (do not include the Penn student) →
- 22. Annual medical and dental expenses not covered by insurance → \$

**SECTION G - PARENTS' ASSETS IN U.S. DOLLARS**

23. Cash, savings, and checking accounts → \$

24. List present accumulated value of retirement funds → \$

25. Investments → \$

26. Assets in sibling's names → \$

27. Assets in pre-paid tuition plans

    a. For Students → \$

    b. For Siblings → \$

28. Primary Home (Renters write "0") → \$  What is it worth today? \$  What is owed on it?

    a. Year purchased →

    b. Purchase price → \$

    c. Monthly home mortgage or rent → \$

29. Other real estate\* → \$  What is it worth today? \$  What is owed on it?

    a. Year purchased →

    b. Purchase price → \$

    c. Is this a rental property  yes  no

\*If you own several properties, provide information in Section K.

**30. Business/Farm:**

Does either parent hold an interest in a

- a. Corporation  yes  no
- b. Partnership  yes  no
- c. Farm  yes  no
- d. Schedule C Business  yes  no

If the answer is yes, submit your most recent business tax return, all pages, schedules, and T4 slips.

**For all business/partnerships (attach additional sheets if necessary)**


**SECTION H - STUDENT'S 2021 INCOME & BENEFITS IN U.S. DOLLARS**

31. 2021 income earned from work by student → \$

32. 2021 dividend and interest income → \$

33. 2021 total untaxed income and benefits → \$

**SECTION I - STUDENT'S ASSETS IN U.S. DOLLARS**

34. Indicate the amount of student assets (e.g., bank accounts, stocks, bonds, CDs) from the following sources:

Source	Amount
Inheritance →	\$ <input type="text"/>
Parents' savings →	\$ <input type="text"/>
Gifts from other →	\$ <input type="text"/>
Student Earnings →	\$ <input type="text"/>
Other <input type="text"/> Please specify	\$ <input type="text"/>
Total →	\$ <input type="text"/>

**SECTION J - MONTHLY BUDGET IN U.S. DOLLARS**

Where possible, unusual expenses that are non-discretionary will be considered in the evaluation. A monthly budget of your family's income/expenses can be particularly useful to us.

	Monthly	Annual
<b>Income:</b>		
Total family income (net after taxes) from all sources _____	\$ <input type="text"/>	\$ <input type="text"/>
Plus income tax refund (use annual column) _____		\$ <input type="text"/>

<b>1. Total Income</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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**Expenses:**

<b>Mortgage/Rent/Utilities</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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**Insurance Payments**

Auto _____	\$ <input type="text"/>	\$ <input type="text"/>
Life _____	\$ <input type="text"/>	\$ <input type="text"/>
Home _____	\$ <input type="text"/>	\$ <input type="text"/>

<b>Food</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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<b>Transportation</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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<b>Medical</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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<b>Educational</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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<b>Entertainment/Vacations</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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<b>Clothing</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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<b>Amount Allocated to Savings/Retirement</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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**Repayment of educational loans borrowed by parents for:**

Parents' education _____	\$ <input type="text"/>	\$ <input type="text"/>
Children's education _____	\$ <input type="text"/>	\$ <input type="text"/>

**Total elementary, junior high school, and high school tuition paid for dependent children:**

Amount paid (don't include tuition for the student) _____	\$ <input type="text"/>	\$ <input type="text"/>
For how many dependent children? (don't include the student) _____	\$ <input type="text"/>	\$ <input type="text"/>

**Debt**

Auto Loan _____	\$ <input type="text"/>	\$ <input type="text"/>
Home Equity Loan(s) _____	\$ <input type="text"/>	\$ <input type="text"/>
Other <input style="width: 150px;" type="text"/> _____	\$ <input type="text"/>	\$ <input type="text"/>

<b>Children's expenses</b> <input style="width: 250px;" type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input style="width: 250px;" type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

**Savings**

Retirement fund contributions _____	\$ <input type="text"/>	\$ <input type="text"/>
Other <input style="width: 150px;" type="text"/> _____	\$ <input type="text"/>	\$ <input type="text"/>

<b>2. Total Expenses &amp; Savings</b> _____	\$ <input type="text"/>	\$ <input type="text"/>
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1. Total Income (from #1) _____	\$ <input type="text"/>	\$ <input type="text"/>
2. Total Expenses & Savings (from #2) _____	\$ <input type="text"/>	\$ <input type="text"/>
3. Net Surplus or Deficit _____	\$ <input type="text"/>	\$ <input type="text"/>

\* If total monthly expenses exceeds your total monthly income, we require you to attach a detailed written explanation of how you meet the outstanding expenses.

Debt and Reason Incurred	Date Incurred	Original Amount	Current Balance	Monthly Payment	Remaining Term	Creditor

**SECTION K - SPECIAL CIRCUMSTANCES**

**Additional Comments:**

You are encouraged to outline any special circumstances to describe your current financial situation. In some cases, expenses of a *non-discretionary* nature (due to illness, unemployment or other unforeseen expenses), may be included in our analysis. If your family has such special circumstances, outline below in the space provided or attach a letter.

**SECTION L - STATEMENT OF CERTIFICATION AND UNDERSTANDING**

We understand that the information provided on this form will be used to determine an estimate of the applicant's financial aid eligibility at Penn and that this will not result in an official financial aid award or guarantee admission to Penn. We further understand that in order to receive an official award, we must be admitted to Penn, and submit all required financial aid application documents as outlined in the Penn Admission website at: [www.admissions.upenn.edu](http://www.admissions.upenn.edu). In addition, we understand that any notification received from Penn based on this information is an estimate only and is subject to change if our subsequent financial information differs.

We hereby certify that the information presented on this application is correct at this time.

Signature of Parent 1 or Guardian1	<input type="text"/>	date	<input type="text"/>
Signature of Parent 2 or Guardian 2	<input type="text"/>	date	<input type="text"/>
Signature of applicant	<input type="text"/>	date	<input type="text"/>