

## PART THREE – Financial Data

### A. Whose income level is being used to process this funding request?

Assistive Technology User

Parent/Guardian of AT User

Authorized Representative of AT User

Combined Financial Information

### B. Monthly Income - Please include all current sources of monthly income

<b>Income Source</b>	<b>Value</b>
Gross Income (The amount earned before Taxes are taken out)	\$
Alimony	\$
Child Support	\$
Retirement/Pension	\$
Food Stamps	\$
Other Income	\$
Social Security	\$
Unemployment	\$
<b>Total Income Source:</b>	<b>\$</b>

### B1: Co-Applicant Monthly Income (If Applicable)

<b>Income Source</b>	<b>Value</b>
Gross Income	\$
Alimony	\$
Child Support	\$
Retirement/Pension	\$
Food Stamps	\$
Other Income	\$
Social Security	\$
Unemployment	\$
<b>Total Co-Applicant Income Source:</b>	<b>\$</b>

**C: Expenses:** **Balance**

**Basic Household Costs:**

Mortgage/Rent	\$
2nd Mortgage	\$
Property Taxes	\$
Household Insurance	\$
Gas & Electric	\$
Telephone/Cell	\$
Water/Sewer/Trash	\$

**1.Subtotal of Basic Household Costs: \$**

**Additional Monthly Necessities:**

Other Property	\$
Groceries/Dining Out	\$
Supplies/Personal Care	\$
Laundry/Clothing	\$
Pets	\$
Tobacco/Alcohol	\$

**2.Subtotal of Additional Monthly Necessities: \$**

**Vehicle and Transportation Costs:**

Bus Fare/Transportation	\$
Car Payment #1	\$
Car Payment #2	\$
Registration	\$
Auto Insurance	\$
Fuel	\$
Vehicle Maintenance	\$
Other Vehicles	\$

**3.Subtotal of Vehicle and Transportation Costs: \$**

**Education and Childcare:**

Student Loans	\$
Day Care	\$
Child Support/Allowances	\$
Tuition/School Supplies/Sports	\$
School Lunches	\$

**4.Subtotal of Education and Childcare: \$**

**5.Subtotal from items 1,2,3,4: \$**

**Health Care and Medical Expenses:**

Co-pays/Premiums	\$
Prescriptions	\$
Other Medical Expenses	\$

**6.Subtotal of Health Care and Medical Expenses: \$**

**Other Monthly Expenses:**

Federal/State Tax Payment Arrangements	\$
Bank Service Charges	\$
Cable/Satellite/Internet	\$
Donation	\$
Dues	\$
Hobbies/Gifts	\$
Newspapers/Magazines/Lottery	\$
Postage	\$
Savings	\$
Tapes/CD/movies/books	\$
Storage	\$
Family Loan	\$

**7.Subtotal of Monthly Expenses: \$**

**8.Subtotal from items 6 and 7: \$**

**Total Amount from items 5 and 8 = Total Debts: \$**

<b>D:Assets/Liabilities</b>	<b>Present Value (Assets)</b>	<b>Amount Owed (Liabilities)</b>	<b>Payment</b>	<b>Comments</b>
Home/Mortgages	\$	\$	\$	
Second Mortgages	\$	\$	\$	
Other Real Estate	\$	\$	\$	
Automobile #1	\$	\$	\$	
Automobile #2	\$	\$	\$	
Other Vehicles	\$	\$	\$	
Recreational Vehicles	\$	\$	\$	
Farming Equipment	\$	\$	\$	
Collectibles	\$	\$	\$	
Stocks, Bonds, Mutual Funds, Retirement Accts.	\$	\$	\$	
Saving Acct. Balances	\$	\$	\$	
Cash Value of Life Insurance Policies	\$	\$	\$	
Credit Card Debt	\$	\$	\$	
Student Loans	\$	\$	\$	
Federal Taxes Owed	\$	\$	\$	
State Taxes Owed	\$	\$	\$	
Local/City Taxes Owed	\$	\$	\$	
Medical Bills	\$	\$	\$	
Other	\$	\$	\$	
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	

**SUBTRACT Liabilities total from Assets total = Net Assets: \$**

**Disposable Income Amount:**

**Total Monthly Income (from part B): \$**

**SUBTRACT -Total Monthly Expenses (from part C): \$**

**Monthly Income minus Expenses = Balance/Disposable Income: \$**