

## Required Documents

- **Fees Assessment.** This can be found on Bear Tracks under the *Financials* section. Please ensure the numbers are not cut-off. You can also ask for one at the Student Connect (First floor of the Admin. Building). They are free of charge, just bring your ONEcard.
- **Spring/Summer Fee Assessment.** Please bring in a copy of this document **ONLY** if you have taken Spring/Summer courses in the year that you are applying for the Access Fund.
- **Student Loan Notice of Assessment.** If you are ineligible for loans please read the section on letters below. Canadian students who are ineligible are required to bring in a copy of the Notice of Assessment for the current year that states they are ineligible.
- **Bank Statements.** We require bank statements for the three previous months for all accounts under the applicant's name.
- **Pay Stubs.** It is necessary for each applicant to bring in May, June, July and August pays stubs from the summer (If your pay cheque is received through direct deposit and is visibly present on your bank statements, the pay stubs are not required).
- **Completed Access Fund Application Form.** All sections up to and including, Section 6: Financial Information and the budget table.
- **Study Permits and proof of funds documentation:** (For international students only) Applicants must provide a copy of their study permits and proof of funds documents that were given to the government of Canada detailing your financial plan when entering the country.

## Documentation for consideration of EXCEPTIONAL EXPENSES

- **Credit card or Line of Credit statements from the previous 3 months.** If asking to cover minimum payments or interest payments, statements must be provided with proof that the expenses were for educational expenses.
- **Higher accommodation costs.** Tenancy agreement/receipts/utility bills must be provided. Applicants are expected to live with a roommate where possible (mature, married and students with dependents are exempt).
- **Medical/Dental/Optical.** Receipts or official documentation must be provided. Please note that if you have opted out of the Students' Union Health & Dental Plan these costs will **not** be considered.
- **Documentation for any exceptional expenses you wish to have considered.** ie: cell phone, internet, daycare costs.

## Letters for consideration of EXCEPTIONAL CIRCUMSTANCES

- **International students.** Please explain why your original financial plan is no longer sufficient.
- **Defaulting on a student loan/Bankruptcy.** Please explain the circumstances of your default.
- **Required Contribution.** Students are expected to contribute \$1500 to their education if they are available to work during the Spring/Summer period. If you are unable to work please explain the reason why.
- **Any other exceptional cases requesting more funding require a letter.**



## Application Information

**Sections 1 through 6 (including the budget section) MUST be completed IN FULL BEFORE your appointment. You must bring all applicable supporting documentation mentioned on page 1 to your appointment.**

## SECTION 1: PERSONAL INFORMATION

Student ID # \_\_\_\_\_

Have you applied for an Access Fund Bursary in the past? ☐ No ☐ Yes, in year \_\_\_\_\_

How did you hear about the Access Fund? \_\_\_\_\_

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_ City/Province \_\_\_\_\_

Postal Code \_\_\_\_\_ Phone Number \_\_\_\_\_

SIN \_\_\_\_\_ Email Address (U of A account) \_\_\_\_\_@ualberta.ca

Residency Status: ☐ Canadian Citizen ☐ Student Authorization ☐ Landed Immigrant

If you are an international student what country are you from? \_\_\_\_\_

If you are an international student and went to high school in Canada, what was the name of your highschool? \_\_\_\_\_

Marital Status: ☐ Single ☐ Married ☐ Common-law ☐ Divorced/ Separated

Number of Dependents (under 18) \_\_\_\_\_ Do your parents live in the Edmonton Area? ☐ Yes ☐ No

Ages of dependents \_\_\_\_\_ When did you graduate High School? \_\_\_\_\_

## SECTION 2: EMPLOYMENT INFORMATION

Place of employment: \_\_\_\_\_ Hours per week: \_\_\_\_\_  
September 2013 to Present

Monthly earnings: \_\_\_\_\_

Place of employment: \_\_\_\_\_ Hours per week: \_\_\_\_\_  
May 2013- August 2013

Monthly earnings: \_\_\_\_\_

Place of employment: \_\_\_\_\_ Hours per week: \_\_\_\_\_  
January 2013-April 2013

Monthly earnings: \_\_\_\_\_

### SECTION 3: EDUCATION INFORMATION

Faculty: \_\_\_\_\_ Specific Program: \_\_\_\_\_

Current Year of Program: \_\_\_\_\_

How many years of post-secondary education have you completed? \_\_\_\_\_

Are you completing an after degree? ☐ No ☐ Yes

If yes, please state first degree: \_\_\_\_\_

Overall GPA \_\_\_\_\_ Expected graduation date? (MM/YY) \_\_\_\_\_

Number of credits currently enrolled in: Fall 2013: \_\_\_\_\_ Winter 2014: \_\_\_\_\_

Were you enrolled in classes during either the Spring or Summer Term? ☐ No ☐ Yes

If Yes, how many credits? Spring \_\_\_\_\_ Summer \_\_\_\_\_

### SECTION 4: GOVERNMENT STUDENT LOAN INFORMATION

Student Loans & Other Government Funding for Fall 2013/Winter 2014: \$ \_\_\_\_\_

Total Student Loans to date: \$ \_\_\_\_\_

Which province do you receive funding from? \_\_\_\_\_

If you have **not** applied for a Government Student Loan, briefly explain why. \_\_\_\_\_

If your funding was insufficient, did you appeal? ☐ No ☐ Yes

### SECTION 5: OTHER FUNDING INFORMATION

#### Additional resources available to you for the current academic year:

Scholarships, awards, bursaries	<input type="checkbox"/> No <input type="checkbox"/> Yes	\$ _____	Line of Credit	<input type="checkbox"/> No <input type="checkbox"/> Yes	\$ _____
Additional assets (GICs etc)	<input type="checkbox"/> No <input type="checkbox"/> Yes	\$ _____	Credit Cards	<input type="checkbox"/> No <input type="checkbox"/> Yes	\$ _____
RRSPs	<input type="checkbox"/> No <input type="checkbox"/> Yes	\$ _____	Emergency Student Loans	<input type="checkbox"/> No <input type="checkbox"/> Yes	\$ _____

## SECTION 6: FINANCIAL INFORMATION

If you are a married/common-law/single parent student, figures should include all family members living with you. If both spouses are U of A students, you should be applying on separate applications but list shared expenses / resources.

### BUDGET FOR Fall 2013/Winter 2014

Income (Monthly)	Reported	Allowable	Expenses (Monthly)	Reported	Allowable
From parents/spouse:		OFFICE	Accommodation: (Rent/Mortgage, etc.)		OFFICE
Employment:			Utilities (includes power, heat, water & basic telephone):		
Band Funding:			Food/Personal Care:		
Child Support / Alimony:			Clothing:		
Child Tax Credit:			Child Care:		
Other (Specify):			Cell phone:		
		USE	Credit Card(s) (min. payment):		USE
			Transportation:		
			Other (Specify):		
<b>Total Monthly Income:</b>		<b>E</b>	<b>Total Monthly Expenses:</b>		<b>E</b>
<b>Monthly Income x 4 or 8 months (A)</b>		ONLY	<b>Monthly Expenses x 4 or 8 months: (F)</b>		ONLY
<b>Savings: (B)</b>			<b>Tuition and Fees: (G)</b>		
<b>Government Funding (C)</b>			<b>Books and Supplies: (H)</b>		
<b>Scholarships and/or Bursaries (D)</b>			<b>Medical/Dental/Optical (I)</b>		
			<b>Other (Specify) (J)</b>		
<b>Total Income for 4 or 8 Months:</b>			<b>Total Expenses for 4 or 8 Months:</b>		
<b>(A + B + C + D):</b>	<b>\$ (E)</b>		<b>(F + G + H + I + J):</b>	<b>\$ (K)</b>	

**SHORTFALL: Total Income (E) – Total Expenses (K)** \_\_\_\_\_

<b>OFFICE USE ONLY:</b>		<b>AFI:</b> _____	<b>App Rating:</b> _____
		<b>Interview Date:</b> _____	<b>Date entered:</b> _____
<b>Documents Requested:</b>	<b>Docs Received</b>	<b>Office Notes:</b>	
<input type="checkbox"/> OOPs Notice of Assessment	<input type="checkbox"/>	<input type="checkbox"/> Check on loan	
<input type="checkbox"/> Credit Card/Line of Credit Card Statements	<input type="checkbox"/>		
<input type="checkbox"/> Medical/Dental bills	<input type="checkbox"/>		
<input type="checkbox"/> Letter _____	<input type="checkbox"/>		
<input type="checkbox"/> Other _____	<input type="checkbox"/>	<b>Funds to Date:</b> _____	



Name: \_\_\_\_\_ ID # \_\_\_\_\_

**--- STOP HERE ---**

**THE SECTION BELOW WILL BE COMPLETED AT YOUR INTERVIEW**

## Statutory Declaration

I \_\_\_\_\_ ,  
Of the city of Edmonton, in the Province of Alberta, do solemnly declare: this \_\_\_\_\_ day of \_\_\_\_\_ AD 2014  
DECLARED BEFORE ME AT  
Edmonton, in the Province of Alberta  
\_\_\_\_\_

\_\_\_\_\_

Signature of Applicant

\_\_\_\_\_

A Commissioner of Oaths  
in and for the Province of Alberta

### Distribution of funds towards Emergency Student Loans and tuition

I \_\_\_\_\_ understand that all or part of the Access Fund Bursary may be used to repay any outstanding Emergency Student Loan that I currently owe to University Bursaries and Emergency Funding (UBEF) and any outstanding tuition for the current or previous semester(s). If I do not wish for this to happen, I must provide documentation and reasoning to the appropriate Financial Aid Office member and it will be at their discretion whether or not to use the Access Fund Bursary to repay outstanding Emergency Student Loans or outstanding Tuition for the current or past semester(s).

Do you understand and agree to this statement?      ☐ No      ☐ Yes

If I disagree, I understand that I must contact the Financial Aid Office Staff member no later than \_\_\_\_\_ if I wish to discuss this.

For Emergency Student Loans, please contact Shelley Mackay with UBEF  
For outstanding tuition amounts, please contact Hailey Markowski with SFAIC

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

## It is a criminal offense to make a false declaration

**PLEASE NOTE:** After your interview, your relevant financial information goes to a Selection Committee who makes the decision regarding your bursary. Your identifying information is kept confidential.