



## FIANCE/SPOUSE FINANCIAL RESOURCES APPLICATION

If you are married or planning to be married by August 1, 2026, please have your fiancé/spouse complete the information below.

HMS STUDENT NAME: \_\_\_\_\_ FIANCÉ/ SPOUSE NAME: \_\_\_\_\_

### 2026/27 Academic Year Projected Income Information

- 1) Fiancé/Spouse's anticipated income earned from July 1, 2026 to June 30, 2027 \_\_\_\_\_  
\*Please indicate source of income \_\_\_\_\_
- 2) Fiancé/Spouse's taxable income (other than earned wages) expected from July 1, 2026 to June 30, 2027 (unemployment compensation, interest income) \_\_\_\_\_
- 3) Fiancé/Spouse's non-taxable income from July 1, 2026 to June 30, 2027 from the following sources:
  - a) Deductible IRA and/or Keogh payments \_\_\_\_\_
  - b) Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings). Include untaxed portions of 401K and 403B plans. \_\_\_\_\_
  - c) Social Security benefits \_\_\_\_\_
  - d) Child support \_\_\_\_\_
  - e) TANF/Welfare benefits \_\_\_\_\_
  - f) Untaxed portions of pensions (excluding "rollovers") \_\_\_\_\_
  - g) Other untaxed income and benefits (explain and provide expected amount(s) to be received from July 1, 2026 to June 30, 2027 such as worker's compensation, foreign income exclusion, etc.).  
\_\_\_\_\_

### Asset information

Please provide fiancé/spouse's current asset information

Value

- 1) Cash/Savings/Checking \_\_\_\_\_
- 2) Stocks/Bonds \_\_\_\_\_
- 3) Trusts \_\_\_\_\_
- 4) Value of home (if owned) \_\_\_\_\_  
Mortgage: \_\_\_\_\_ Year purchased: \_\_\_\_\_
- 5) Other Real Estate \_\_\_\_\_
- 6) Retirement account(s) \_\_\_\_\_
- 7) Other investments (please describe): \_\_\_\_\_

*I/we certify that information listed above is a complete and accurate breakdown of all expected assets and income, taxed and untaxed, for the 2026/27 Academic Year. I further certify that if any information of the above information changes, I will notify the Financial Aid Office in writing of the changes.*

Student's Signature: \_\_\_\_\_

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

Spouse's Signature: \_\_\_\_\_

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