

FIANCE/SPOUSE FINANCIAL RESOURCES APPLICATION

If you are planning to become married by August 2015 and/or are recently married yet filed your 2014 federal tax return as Single, please have your fiancé/spouse complete the information below.

HMS STUDENT NAME: _____ FIANCÉ/SPOUSE NAME: _____

2015/16 Academic Year – Projected Income Information

- 1). Fiance/Spouse's anticipated income earned from July 1, 2015 to June 30, 2016 _____
*Please indicate source of income _____
- 2). Fiance/Spouse's taxable income (other than earned wages) expected from 07/01/15 to 06/30/16 (unemployment compensation, interest income,...) _____
- 3). Fiance/Spouse's Non-taxable income from 07/01/15 to 06/30/16 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 07/01/15 to 06/30/16, such as: worker's compensation, foreign income exclusion, etc.).

2015-16 Academic Year – Asset Information.

- Please provide fiancé/spouse asset information estimated as of July 1, 2015 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 Accounts: _____
 - 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 2015/16 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: _____