

Student Financial Statement



Guidelines for completing the

MA Global Studies Student Financial Statement

Students wishing to apply for need-based financial aid should complete this Student Financial Statement. Candidates will be automatically considered for all fellowships and scholarships for which they are eligible. Information contained in this and other aspects of the financial aid application is strictly confidential and processed according to data protection guidelines. Applications will be reviewed by the Admissions & Financial Aid Committee of the MA in Global Studies program and the Financial Aid Office at Bard College. Please note that the program awards need-based financial aid. Please consult the financial aid section of our program website for a breakdown of total estimated cost of attendance.

Answer all questions that apply to you and your family. Enter all figures in US dollars (\$). Some of the questions on the Student Financial Statement Form are self-explanatory; the instructions that follow are only provided for questions that may need further explanation.

Section A - Applicant's Information: This section pertains to the person who is applying for aid in order to attend the MA program.

Section B - Family Information: On this application, "parents" means the custodial parent(s) – the parent or parents (or legal guardian) with whom the student lives, or lived with. If the student's biological or adoptive parents are divorced or separated, the custodial parent(s) are the parent or parents with whom the student has lived the most during the 12 months prior to filling the application. If the custodial has remarried, "parents" includes the student's biological/adoptive parent and stepparent.

13. Write in the number of people who live in your parents' household and are supported by their income.

14. Complete all parts of this question. Include family members counted as your dependents in question 9 and/or counted as your parents' dependents in question 13.

Section D - Asset Information: Asset information pertains to the parents or to the student and the student's family if the student is married and lives independently of the parents. Write in the value of assets and, where asked, any debt against the asset as of the time you complete this application.

Section E - Expenses: Write in the annual amount your family spent on the items listed. If you do not know the actual amount, please estimate.

Please provide supporting documentation in addition to this form. Please send copies of tax return forms / statement from employer / other confirmations of information provided in the financial statement.

Section A - Applicant's Information

1. Name:

Last Name

First Name

Middle Name

2. Are you applying to the MA in Global Studies Program at Bard College?

3. E-mail:

Yes

No

4. Current address:

Street, Number, Apt., etc.

City

State

ZIP/Postal Code

Country

Telephone (including country and city code)

5. Mailing address (if different from above):

Street, Number, Apt., etc.

City

State

ZIP/Postal Code

Country

Telephone (including country and city code)

6. Date of birth (dd/mm/yyyy):

9. Marital status:

Married

7. Place of birth:

Not married

8. Present citizenship:

If married, how many people are financially dependent on you?

Section B - Family Information

10. Your parents' marital status:

Married or in a domestic relationship

Separated/ Divorced

Widowed

Remarried

Never married

Other:

11. Parent 1 Name:

12. Parent 2 Name:

Last Name

First Name

Age

Last Name

First Name

Age

Relationship:

Relationship:

Address:

Address:

Occupation/Title:

Occupation/Title:

Employer:

Employer:

Number of years with current employer:

Number of years with current employer:

13. How many people, other than yourself, depend on the family's income for daily expenses?

14. List each dependant. Provide information for all family member you included in p.4 above.

Full Name

Age

Relationship (see code below)

Code: 0=self; 1=parent; 2=stepparent; 3=legal guardian; 4=brother/sister/stepbrother/stepsister; 5=spouse; 6=son/daughter; 8=grandparent.

Section C - Financial Information

15. What documentation will you be providing to verify income and asset information requested on the form?

Tax return (preferred)

Other (specify - for example, bank statement):

Statement from employer

16. Do you currently live with or otherwise receive financial support from your parents? Yes
No

17. Please elaborate:

18. Do you have a source of emergency funds? Yes
No

19. If yes, name source and amount available in USD (\$)

20. Please indicate the source(s) of your money for your transportation costs to Bard College's campus in Annandale-on-Hudson, NY:

21. What is the total amount of money you expect to have when you arrive at this institution for personal expenses?

22. Do you plan to remain in the Annandale-on-Hudson area during the summer? Yes No

23. If yes, name source and amount available in USD (\$)
for your summer stay:

24. During 2020, how much of your own household income (before taxes/expenses) came from the following sources?

Parent 1 work	Family business	Interest/dividends
Parent 2 work	Family real estate holdings	Housing, food, and other living allowances
Your work	Pension/annuity/retirement	
Your spouse's work	Other members of the household	Other (explain)

25. Will there be a significant increase or decrease in your or your family's income next year? Yes
No

26. If yes, explain:

Section D - Asset Information: This section pertains to the parents or to the student and the student's family if the student is married and lives independently of the parents.

27. Does your family own its house? Yes No

Year purchased	Original purchase price (€)	Amount still owed on the home (€)	Present market value (€)
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28. Does your family own a business? Yes No

Date business commenced	Type of business
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Your parents' share of business value (\$)	Your parents' share of business indebtedness (\$)
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29. Please list the value of the following family assets (if applicable):

Land and buildings (other than home or business)	Assets owned by student
Indebtedness on land and buildings	Money owed to family by others
Savings	Repayment (of p. above) expected this year
Investments (such as stocks and bonds)	Other (jewelry, artwork, antiques, etc.)

30. Do you or your family have money, property, or assets in another country? Yes No

31. If yes, complete the grid below. Include the amounts in q. 29 above.

	USD (\$) value	In which country(ies)?	Asset owner
Money			
Property			
Assets			

Section E - Expenses

32. How much did your family spend on the following expenses during the most recent year you have information for (2020)? Specific amounts in USD (\$) are needed. If you do not know the actual amount, please estimate.

Rent or mortgage	Amount allocated to savings/retirement
Utilities	Automobile maintenance
Food	Insurance (health and property)
Clothing	Entertainment
Household necessities	Vacations
Medical expenses	Other
Educational expenses	Please explain:
Loan payments	
Taxes	

33. How much money does your family owe to other people or to financial institutions?

34. Amount paid on debt in 2020:

35. Reason for debt:

36. Does your family employ other people?

Yes No

37. If yes, how many in the home?

In the family business?

Section F - Educational Support

38. Enter the expected amount of annual support in USD toward your educational costs (including tuition and annual living expenses like housing, food, health insurance, travel costs, academic materials and other personal expenses) from the sources listed below:

	<u>2021-22</u>	<u>2022-23</u>	<u>Notes</u>	<u>Notes</u>
Student's earnings				
Student's assets				
Family's income				
Family's assets				
Relatives and friends				
Your government				
Agencies and foundations				
Private sponsor (explain in Section G)				
Other (explain in Section G)				

39. List agencies, foundations other than the MA in Global Studies program to which you are applying for financial assistance, e.g. FAFSA, government loans and grants (if more than two, please attach a list):

<u>Agency/Foundation</u>	<u>Application Date</u>	<u>Notification Date</u>	<u>Expected Amount (EUR)</u>
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Section G - Explanation/Special Circumstances

40. Use this space to tell us about any facts or circumstances that are relevant to financial assistance, but may not be included in or obvious from the data supplied in this form. Use additional sheets of paper if necessary.

Please provide supporting documentation in addition to this form. Please send copies of tax return forms / statement from employer / other confirmations of information provided in the financial statement.

Certification and Authorization

We declare that the information on this form is true, correct, and complete. The MA in Global Studies program or the Financial Aid Office at Bard College have our permission to verify the information reported by obtaining documentation as needed. We understand that we must give notice to the program if our financial situation changes. We recognize that providing fraudulent information is grounds for termination of the application process. In a case where admission has already been granted, we recognize that it may jeopardize one's student status.

Student's signature

Spouse's signature

Date completed:

Parent's signature

Parent's signature

Consent Form

For use of electronic notification

I hereby grant the MA in Global Studies program at Bard College (or the Financial Aid Office at Bard College) permission to send me notification of a financial aid award to the email address indicated below. My signature below represents my understanding that email is considered an insecure medium. I release the college from any responsibility or liability should a breach of privacy result from this email communication. This permission remains in effect until such time as I revoke it in writing.

Student's name

Student's signature

Student's E-Mail Address

Parent's E-Mail Address

Date