



Financial Aid Office

2400 Ridge Road • Berkeley, CA 94709-1212 • Ph:(510) 649-2469
Email: finaid@gtu.edu • Web: <http://gtu.edu/admissions/financial-aid>

2023-2024 Financial Aid Budget Adjustment Request

Student's Name: _____ **Student ID or SSN#:** _____

We use standard budget allowances in determining your aid eligibility and may reevaluate the budget components if you incur unusual actual or estimated expenses that exceed the standard Cost of Attendance (COA). If you have reviewed the Financial Aid Budget Adjustment Policy and the standard COA and would like to request consideration for an adjustment of your additional education-related expenses while enrolled at least half-time in an eligible degree or certificate program, please complete this form.

As required by federal regulation, budget adjustments may only be made for allowable expenses related to a student's education. Exceptions will not be made to exceed the maximum increase limits listed on this form. If your expenses exceed the maximum limits, it is up to you to make necessary arrangements to cover the difference. An increase to your student budget means you will be borrowing additional loans to cover approved educational expenses. The request for a budget adjustment does not guarantee that an adjustment will be made; all decisions based on this request are final.

List your indirect or non-tuition COA expenses to be considered for budget increase. Expenses must be incurred during the semester(s) you will attend in the 9-month 2023-24 academic year. Expenses that are not sufficiently documented will not be considered.

IMPORTANT: Supporting documentation is required with submission of this form. Documentation may include copies of your lease, receipts of purchases, contracts with daycare providers, and paid medical/pharmacy receipts.

Please select applicable indirect cost(s) to be considered for this budget adjustment request:

STUDENT EXPENSES

- Housing
Student's Share of Rent/Mortgage \$ _____ Month
- Out-of-Pocket Medical/Dental/Optical Expenses..... \$ _____ Term/Academic Year
- Childcare Expenses..... \$ _____ Month
- Transportation..... \$ _____ Term/Academic Year
- One-Time Computer Purchase \$ _____ Actual cost
- Out-of-Pocket Disability Related Expenses..... \$ _____ Term/Academic Year
- Other Educationally-Related Expenses \$ _____ Term/Academic Year

I certify that all information reported in all sections of this form is true, complete, and accurately reflect my extenuating education-related costs to the best of my knowledge. Falsification of records or misrepresentation will be cause for denial, reduction, withdrawal and/or repayment of financial aid. I will report any changes in writing to the Financial Aid Office. I understand that adjustments may not be made after an enrollment period has ended and that I must complete a new Budget Adjustment Request for each year that I have unusual education-related costs in excess of the standard cost of attendance and it is my responsibility to initiate this process each year.

WARNING: Any person who knowingly makes a false statement or misrepresentation on this form or on any accompanying document is subject to penalties that may include fines, imprisonment, or both, under the U.S. Criminal Code and 20 U.S.C. 1097.

Signature: _____ Date: _____



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Budget Worksheet

2023-2024 Academic Year

In considering an application for a Budget Adjustment Appeal, we begin by reviewing the estimated cost of attendance and projected income for the student during the 9-month period of enrollment that the Federal Direct Loan funds will be used. For 2023-24, the period of enrollment is 09/05/2023 to 05/17/2024. The budget is based solely on the student’s expenses and is not intended to cover the expenses of additional family members. In order to evaluate your eligibility for the federal Unsubsidized and/or Graduate PLUS Direct Loan you must designate the allowable educational expenses that will be covered by the federal Direct Loan you are requesting.

If you have not considered the impact that additional borrowing through the federal Direct Loan program will have on your future loan repayment, we recommend that you use the loan estimator at studentaid.gov or the loan calculators available at www.finaid.org to examine future loan repayment scenarios based on projected cumulative loan debt figures.

I. Please list your current cumulative student loan debt

Log in to studentaid.gov to acquire your aggregate federal student loan indebtedness figures.

- * Total non-federal private education loans \$ _____
- * Total outstanding federal subsidized student loans \$ _____
- * Total outstanding federal unsubsidized student loans \$ _____
- * Total outstanding federal Perkins student loans \$ _____

II. Student Educational Expenses

	<i>4½ Month Semester</i>	<i>9-Month Academic Year</i>
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Tuition or Fees	_____	_____
Books and Supplies	_____	_____
Housing	_____	_____
Food	_____	_____
Transportation	_____	_____
Personal Expenses	_____	_____
Health/Medical	_____	_____
Miscellaneous Expenses	_____	_____
Loan Fees	_____	_____
Other: _____	_____	_____
Other: _____	_____	_____
Other: _____	_____	_____

TOTAL EXPENSES

	_____	_____
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III. Student Income & Resources

	<i>4½ Month Semester</i>	<i>9-Month Academic Year</i>
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Student Work Income	_____	_____
Spouse/Partner Work Income	_____	_____
School-based Grants/Scholarships	_____	_____
External Grants/Scholarships	_____	_____

Other Resources:

_____	_____	_____
_____	_____	_____
_____	_____	_____

TOTAL INCOME

	_____	_____
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Maximum Allowable Cost of Attendance Adjustments

2023-2024 Academic Year

Type of Allowance	Standard Cost of Attendance Components	Maximum Allowable Increases	Documentation Required
Housing	\$1,250/month \$11,250/academic year	\$5,100/academic year	Copy of a signed lease or monthly mortgage statement. If rent is not shared equally, you must provide documentation of your share (<i>if married, rent will be split equally</i>).
Transportation to/from campus or academically-related activity	\$1,125 /per single term \$2,300/academic year	\$1,800/academic year	Commuting expenses: Travel in excess of 80 miles or more round-trip will be considered. When calculating mileage, use the IRS Standard Mileage Rate of \$.54/mile and costs for tolls and parking may be considered.
One-time computer purchase for educational purposes		\$1,500	Purchase receipt or invoice is required. A budget increase to purchase or upgrade computer may be requested one-time only during the course of a student’s degree program.
Necessary medical/dental/optical service not covered by insurance (e.g. check-ups, lab work, prescriptions)	\$1,500/per single term \$3,000/academic year	\$3,000/academic year	Medical or Dental Adjustment form, copies of receipts/billing statements which include the date of office visit/procedure, cancelled checks, credit or debit card statements, or a written estimate from your physician. Include documentation of insurance coverage indicating what portion of your bill(s) will not be covered.
Childcare for dependents under the age of 12 related to attendance at the GTU during class and study time allowances		\$500/month per child maximum, per academic year	Childcare Expense form, contract, cancelled checks, receipts, or statement from provider. GTU uses the federal definition of a credit-hour to calculate childcare costs. (<i>34 CFR 600.2 defines a credit-hour as one hour of classroom or direct faculty instruction and a minimum of two hours of out of class student work each week for a total of three hours</i>)



Doctoral and MA Student Budget 2023-2024 Academic Year

For the purpose of TIV federal student aid, COA figures are established through student surveys and other research and allowable expenses include: tuition and fees, books and supplies, room and board, transportation, health insurance, federal student loan fees, and personal expenses related to school attendance. Costs incurred prior to the start of the academic year, consumer debt payments, car payments, charitable gifts, legal fees, life insurance, etc., are not considered allowable expenses. The GTU Financial Aid Office may adjust the cost of attendance for students on a case-by-case basis to address individual circumstances as allowed by GTU Policy and the federal regulations defined by the U.S. Department of Education. Before submitting an appeal to request a budget adjustment, carefully read the, “*Financial Aid Budget Adjustment Policy*” under the Financial Aid Policies section of <http://www.gtu.edu/admissions/financial-aid>.

The following costs are an estimated average of completing the 2023-2024 academic year at the Graduate Theological Union. This budget serves as the foundation for determining student’s financial need as well as the amount of qualified institutional grant/scholarship and federal student aid that can be offered, and is provided to assist GTU students in estimating their budgetary requirements for the **nine (9) month academic year only**. As these costs are only *estimates*, individual budgets may vary considerably.

2023 2024 Tuition and Fees	Per credit	4.5 semester	9 month academic year
Ph.D. tuition	\$1,550	\$18,600	\$37,200
Ph.D. continuing relations fee		\$5,015	\$10,030
MA tuition (matriculated prior to Fall 2022)	\$850	\$10,200	\$20,400
MA tuition (matriculated after Fall 2022)	\$1,050	\$12,600	\$25,200
MA continuing relations fee		\$5,015	\$10,030
2023 2024 Non tuition costs	Per month		
Books		\$500	\$1,000
Housing	\$1,300	\$5,850	\$11,700
Food	\$336	\$1,510	\$3,020
Transportation	\$250	\$1,150	\$2,300
Medical		\$1,500	\$3,000
Miscellaneous	\$140	\$630	\$1,260
Loan Fees		\$110	\$220
Total non-tuition expenses	\$2,026	\$11,250	\$22,500
Total 2023 2024 COA			
Ph.D. in tuition		\$29,850	\$59,700
Ph.D. continuing relations fee		\$16,265	\$32,530
MA tuition (matriculated prior to Fall 2022)		\$21,450	\$42,900
MA tuition (matriculated after Fall 2022)		\$23,850	\$47,700
M.A continuing relations fee		\$16,265	\$32,530