

PARTNER'S FINANCIAL INFORMATION FORM



In cases where married or common-law students are both attending post-secondary studies full time but only one student is applying for student financial assistance, **the student who is not applying for New Brunswick Student Financial Assistance must complete this form.**

1. PERSONAL INFORMATION

• Student applying for student financial assistance

Social Insurance Number	First Name	Last Name
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• Student not applying for student financial assistance

Social Insurance Number	First Name	Last Name
Name of Educational Institution	Program of Study	
Period of Study Start Date ____ / ____ / ____ YYYY MM DD	Period of Study End Date ____ / ____ / ____ YYYY MM DD	

2. PRE-STUDY RESOURCES

(i) Were you in school until April 2016 and your classes start in September 2016? Yes ___ No ___
If yes, your pre-study period is May 2, 2016 to September 3, 2016. If no, go to question (ii).

(ii) Were you in school until June 2016 and your classes start in September 2016? Yes ___ No ___
If yes, your pre-study period is June 27, 2016 to September 3, 2016. If no, go to question (iii).

(iii) Were you in school full-time immediately prior to the start of the study period for which you are applying? Yes ___ No ___
If yes, indicate the dates of your prior study period. If no, go to question (iv).

Start Date ____ / ____ / ____ End Date ____ / ____ / ____
YYYY MM DD YYYY MM DD

If you did not receive student financial assistance from this office during the previous study period, you must provide proof of dates of study and full-time enrolment from the post-secondary educational institution you attended. You do not have a pre-study period.

(iv) Have you been out of school for more than 18 weeks prior to the start of classes, or not in school previously? Yes ___ No ___
If yes, your pre-study period is the 18 weeks prior to the start of classes. If no, go to question (v).

(v) Were you in school for a different period than those indicated above? Yes ___ No ___
If yes, your pre-study period is the time between study periods, up to a maximum of 18 weeks. Indicate the dates between the end date of your last study period and the start of this academic year.

End Date of last study period ____ / ____ / ____ Start date of this study period ____ / ____ / ____
YYYY MM DD YYYY MM DD

Indicate all expected income during your pre-study period.

Employment Earnings \$ _____ Employment Insurance Benefits \$ _____

Social Assistance \$ _____ CPP/QPP Benefits \$ _____

Other \$ _____ ▶ List Source _____



3. STUDY PERIOD RESOURCES

- Do you/will you have any financial resources during your study period? Yes ____ No ____
If Yes, provide detailed information as indicated below. Indicate all income **before deductions** that you expect to receive **during your study period** from the following sources.
- How many months will you work during this study period? _____ (Total number of months)
- Estimated monthly Study Period Employment Earnings – include all earnings from Co-op Work Term or paid practicum, if applicable \$ _____ (Monthly)
- Assistantship / Honorarium / Fellowship or Research Grant \$ _____ (Total for this study period)
- Social Assistance \$ _____ (Monthly)
- Support payments that you will receive \$ _____ (Monthly)
- Employment Insurance Benefits \$ _____ (Bi-weekly)
- Savings, Mutual Funds, stocks & bonds, GICs – *do not include any money saved from your income indicated in Section 2 above* \$ _____ (Total for this study period)
- Scholarships/Bursaries
 - Source _____ \$ _____
 - Source _____ \$ _____
- Registered Retirement Savings Plan (RRSP) – see **NOTE** below \$ _____ (Value of RRSP)
 - Date left high school _____
 YYYY MM DD
- Educational Trust Funds or Registered Education Savings Plan (RESP) \$ _____ (Value of Plan)
- Indicate any financial resources you will receive as an Aboriginal person \$ _____ (Total for this study period)
- Indicate the monthly amount you will receive in Canada or Quebec Pension Plan Benefits.
 - (a) Due to your disability \$ _____ (Monthly)
 - (b) Retirement Pension \$ _____ (Monthly)
 - (c) Due to your parent's disability \$ _____ (Monthly)
 - (d) Survivor's Benefit \$ _____ (Monthly)
- Have you met or are you planning to meet with an Employment Counsellor concerning Training and Skills Development funding for your program of study? Yes ____ No ____
- Indicate total amount and source of any other income or sponsorship, not indicated above, you will have during this study period. \$ _____ (Total for this study period)
 - Source _____
 - Are you receiving this income because you are a student? Yes ____ No ____

NOTE: Report the total value of all RRSPs that are owned by you/your partner, if applicable. A letter detailing the breakdown of all RRSP assets must be submitted to SFS. Include the following details for both you and your partner, if applicable.

- Lifelong Learning Withdrawals – Value of any Lifelong Learning withdrawals you/your partner has made, or will be making on your behalf, for the period of study for which you are applying.
- Taxable Withdrawals – Indicate the value of any taxable withdrawals you/your partner has made, or will be making on your behalf, for the period of study for which you are applying.
- Uncashed RRSPs – Indicate the current market value (principal and interest) of all RRSP accounts owned by you/your partner, if applicable. Do not include any money in a locked-in RRSP (usually the transfer value of pension benefits from a former employer's pension plan).