UNIVERSITY OF TORONTO
SCHOOL OF GRADUATE STUDIES

SGS Financial Need Assessment Form

It is expected that prior to applying for need based awards and support, students will have explored all sources of funding such as OSAP or other government grants and loan programs.

Last Name:	First Name:
Student Number:	Graduate Unit:

EXPECTED EXPENSES for the academic year 2026- 2027		**A**		**B**	**C**
Enter # of months registered (e.g. 4, 8, or 12):_____		**Monthly Allowable Amount**		**# Months Registered**	**Total CAD (A x B = C)**
1) LIVING EXPENSES (choose one living arrangement type in column A (i.e. No Housing Costs OR Has Housing Costs)		**No Housing Costs (e.g. no rent)**	**Has Housing Costs (e.g. rent, utilities)**	**As entered above**	
Single/separated/divorced		◯ $801	◯ $2535	x 0	$ 0.00
Partnered		◯ $1801	◯ $4258		
Number of dependent(s) 0-12: _____	List age(s) of dependent(s) (e.g. 1, 3, 5): _____	◯ $466 x # of children	◯ $917 x # of children	x 0	$ 0.00
Number of dependent(s) 13-18: _____	List age(s) of dependent(s) (e.g. 16, 17): _____	◯ $584 x # of children	◯ $1035 x # of children	x 0	$ 0.00
2) TUITION for 2026-27					
Tuition, incidental, system access & ancillary fees (refer to student accounts website)					$
3) ADDITIONAL EXPENSES Supporting documentation must be provided for each value listed below. Examples include books and equipment/lab supplies, medical and dental costs that exceed the coverage amount of OHIP, UTGSU supplementary plan, or UHIP, and exceptional unanticipated expenses (such as unexpected travel costs due to family death or terminal illness). Specify the expenses and amounts below. **Do not include rent/mortgage in the section.**					
i)					$
ii)					$
iii)					$
iv)					$
v)					$
Total Expected Expenses (sections 1 – 3)				$	0.00 CAD

EXPECTED RESOURCES (must be for the same timeframe as the Expected Expenses section)				**Total**
Government Student Loan/Aid/Sponsorship (check one): ☐ OSAP ☐ Out-of-province ☐ Sponsorship ☐ U.S. loan ☐ Other:_____ *Notice of Assessment/Preliminary Assessment must be attached				$
UTAPS (University of Toronto Advanced Planning for Students program)				$
Student line of credit / financial institution loan (Total available for the full academic year)				$
Savings available for the full academic year				$
Total amount of graduate funding (i.e. base/stipend amount + tuition), which includes Fellowships, RShips, TAships	Enter stipend /base amount (e.g. $31,000)			$
	Enter tuition support amount			$
Other TA / RA / GA / CI income above funding package – enter total only				$
Other awards (i.e. from internal/external funding sources above funding package) – enter total only				$
Other employment income (net amount after tax deduction)				$
Funds/support from family member(s)				$
50% partner's income after tax deduction (i.e. net income divided by 2). This amount must be provided if partnered is selected in Expected Expenses section above.				$
Child support or government assistance/benefits (total monthly amount, i.e. monthly child support for all children + monthly government assistance, etc)	Monthly amount $	X	Number of months 0	$ 0.00
Accessible investments / RESP (amount withdrawn for the current year only)				$
Other support/assistance/resources (specify below):				
i)				$
ii)				$
Total Expected Resources				$ 0.00 CAD
AVAILABLE RESOURCES Financial need is normally demonstrated when a negative or small amount (< $500) appears in this field.				**$** 0.00 **CAD**

OSOTF Residency Requirements: To be eligible for OSOTF awards**,** you must: i) be a Canadian Citizen/Permanent Resident of Canada/Protected Person, **and** ii) have one of the following residency statements apply to you:

I have lived in Ontario all my life.

As of the start of my studies, Ontario was the last province in which I lived (or will have lived) for at least 12 months in a row, without including months of full-time college or university studies.

As of the start of my studies, Ontario of the last province in which my parent(s) lived (or will have lived) for at least 12 months in a row.

As of the start of my studies, Ontario is the last province in which my spouse lived (or will have lived) for at least 12 months in a row, without including my spouse's months of full-time college of university studies.

I live in Ontario and one of the following statements is true:

- I have lived in Canada for less than 12 months in a row, and have NOT lived in any other Canadian Province or territory for 12 months in a row (excluding time in full-time college or university studies);
- My parent(s) and I have lived in Canada for less than 12 months in a row, and have NOT lived in any other Canadian province or territory for 12 months in a row (excluding time you spent in full-time college or university studies); or
- My spouse and I have lived in Canada for less than 12 months in a row, and have NOT lived in any other Canadian province or territory for 12 months in a row (excluding time spent in full-time college or university studies).

Are you a resident of Ontario as defined by at least one of the above being true? ◯ Yes ◯ No

* Domestic out-of-province and international students are ineligible for OSOTF awards.

Applicant's Declaration and Authorization: I declare that the foregoing information is, to my knowledge, a true, complete, and accurate statement of my financial status. This application and all supporting documents will be retained on SGS record. I understand that SGS may contact my sources of supporting documents and make use of university financial and academic records to verify information. In addition, failure to disclose or intentionally falsify information may result in permanent ineligibility to apply or receive any future financial support. I hereby request consideration for assistance from the funds made available for this purpose by the University. I understand that if awarded, any monies owing to the University will be deducted unless otherwise approved and authorized by the University of Toronto to release the amount(s) to federal and/or provincial student financial aid office(s).

Signature of Applicant: Date:

☐ I have included all receipts or supporting documents for expenses listed in section #3 (if claimed)

Click here for SGS Financial Need Assessment Form Instructional Guide

Reset Form

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