

**Whitney Benefits, Inc. Student Loan Program
2011-2012 Funding Worksheet**

Name: _____ Phone: _____

Money for Summer 2011, Fall 2011, Winter 2012 and Spring 2012 (circle one).

Is your school on : Semesters ___ OR Qtrs. ___

Submit OFFICIAL Transcript:

Grades: You must have 12 credit hours and a 2.25 gpa for the semester/quarter. If in graduate school, per Loan Agreement:

Semester/Quarter just completed (**Not cumulative**): Credit hours: _____ Grade point average: _____

Submit proof that you are enrolled in college for Summer 2011, Fall 2011, Winter 2012, or Spring 2012 (i.e. Proof of enrollment form or copy of schedule):

Name of college and proof of enrollment: _____

Submit complete 2011-2012 Student Aid Report (SAR) with Expected Family Contribution (EFC):

2011-2012 EFC: \$ _____

Submit SIGNED Student's 2010 1040 Form and SIGNED Co-Borrower's 2010 1040 Form:

Student's Adjusted Gross Income: _____ Co-Borrower's Adjusted Gross Income: _____

Cost of Attendance: \$ _____ If your school is not listed on Whitney's Cost of Attendance Sheet, you must provide the following for the school you will be attending. Submit proof of cost of attendance:

Yearly Tuition and Fees:	\$ _____	Please provide printout
Yearly Room and Board:	\$ _____	Please provide printout: double occupancy/most meals
Books:	\$ 1,200	
Travel:	\$ 889	
Personal Expenses:	\$ 2,200	
TOTAL COST OF ATTENDANCE:	\$ _____	

Qualifying Students may borrow, each semester/quarter during their undergraduate/graduate education, the lesser of the following amounts:

1. Cost of Attendance: _____
2. 70% of Cost of Attendance (COA): _____
3. Line Item 2 multiplied by the Student's applicable percentage from the Whitney EFC Chart (see Whitney EFC chart): _____
4. 1/2 of Line Item 3 for schools on semesters or 1/3 of Line Item 3 for schools on quarters: _____

OR

5. The annual limit established by Whitney Trustees: **\$11,462.50**.
6. Line Item 5 multiplied by the Student's applicable percentage from the Whitney EFC Chart (see attachment): _____
7. 1/2 of Line Item 6 for schools on semesters or 1/3 of Line Item 6 for schools on quarters: _____

8. Which Line Item is lesser in amount, Line Item 4 or Line Item 7: Enter the **lesser** amount: _____

This amount cannot exceed \$5,731.25 per semester or \$3,820.83 per quarter.

Is this the amount you would like to borrow? _____ If not, how much do you want to borrow? _____

You may not request more money than you qualify for in Line 8.

Do you want the check mailed or pickup (circle one): If mailed, please provide address:

