



## Student Financial Services

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### 2024-25 Request for Budget Adjustment Instructions

If you feel the amounts used in the cost of attendance (COA) listed on your financial aid offer do not reflect your current situation, you may be eligible to have your COA re-evaluated by submitting appropriate documentation. **While increasing your COA does not change your eligibility for grants or scholarships, you may be eligible to borrow more through a Federal Direct Loan, Private Loan, or PLUS Loan.**

Most students already receive the maximum Federal Direct Loan for the academic year based on their grade level; please review maximum annual loan limits [here](#). If you need to borrow additional loan funds and you aren't sure whether this form is needed, please visit [uwm.edu/meetsfsc](http://uwm.edu/meetsfsc) to make an appointment to discuss your circumstances for a budget adjustment. If a budget adjustment is approved, the other loan options are Private/Alternative Loans, Parent PLUS, and Grad PLUS Loans, and they all require a credit check.

#### **Please Note:**

- Forms will be returned, and processing may be delayed if forms are incomplete, or all required documents aren't submitted at the same time.
- The expenses must be yours but could be purchased by a parent (if you are dependent) or a spouse.
- The date of service or purchase must occur during the 2024-25 academic year. For those enrolled during the fall 2024 and spring 2025 terms, the dates are September 2024 - May 2025. For those enrolled in the summer 2025 term, the dates are May 2025 - August 2025. Computer purchases may occur three months prior to the start of the 2024-25 academic year.
- Submit the form and appropriate documentation as soon as possible as processing times vary and can take between 3-6 weeks depending upon the time of the year. The documents should be submitted no later than the dates indicated below for each term:

Fall 2024 – November 22, 2024	Spring 2025 – April 18, 2025	Summer 2025 – June 2, 2025
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- There is no guarantee that forms submitted after the dates indicated above will be reviewed prior to the end of the term.
- Once review of your documents has been completed, we will send an email to your UWM account with the results and any additional required steps.

# 2024-25 Request for Budget Adjustment

**STUDENT NAME:**

**STUDENT ID #:**

Check the appropriate box or boxes that pertain to the circumstance(s) which best describes your situation. Be sure to **submit both pages** of the request for budget adjustment form including statement of certification.

Budget Adjustment Reason	Documents Needed/Checklist
<p>Purchase of Personal Computer</p> <p>Note: The maximum amount that a student's cost of attendance will be increased is equal to the actual cost of the computer hardware and software, or \$2,000, whichever is less and will only be increased <b>once per degree for a computer purchase.</b></p>	<p><input type="checkbox"/> Proof of purchase (if already purchased, sales receipt)</p> <p><b>OR</b></p> <p><input type="checkbox"/> Personalized estimate. Needs to be <b>signed and dated</b> and must include the <b>type of hardware/software</b> to be purchased, the <b>cost</b>, the <b>vendor</b> from whom you will be making the purchase from, and the <b>estimated date of purchase.</b></p>
<p>Disability</p> <p>An allowance for expenses related to a student's disability may be included in the cost of attendance. These expenses include special services, personal assistance, transportation, equipment, and supplies that are reasonably incurred and not provided by other agencies.</p>	<p><input type="checkbox"/> Proof of payment (such as official receipts) for at least two months. Please total amounts.</p>
<p>Books and Supplies</p> <p>Semester(s) requesting adjustment for:</p> <p style="padding-left: 40px;">Fall 2024    Spring 2025    Summer 2025</p> <p>Original Budget (per semester) \$400 Documentation must show costs more than this.</p>	<p><input type="checkbox"/> Receipts showing the actual costs for at least one term.</p> <p><input type="checkbox"/> Syllabus indicating supplies needed and documentation for cost of those supplies.</p>
<p>Transportation</p> <p>Semester(s) requesting adjustment for:</p> <p style="padding-left: 40px;">Fall 2024    Spring 2025    Summer 2025</p> <p>Original Budget (per semester) \$838 Documentation must show costs more than this.</p>	<p><input type="checkbox"/> Google Maps or other printout showing miles traveled.</p> <p>May include travel between school, residence, and place of work.</p>



## Childcare Worksheet (Complete if Requesting Adjustment for Childcare Expenses)

This section is to be completed by the **Childcare Provider**:

Name of Childcare Facility or Individual:		
Address:		
City:	State:	Zip Code:
Phone number:		
Supervisor (if applicable):		

Identify the children that are enrolled in this Childcare Facility:

Name	Age	Dates of Expected Childcare Enrollment	Number of Hours per week of Childcare	Rate per hour	Total cost per week
		_____ to _____			
		_____ to _____			
		_____ to _____			
		_____ to _____			
		_____ to _____			

Total Cost for Childcare    \$ \_\_\_\_\_

Is this parent receiving W2, State of Wisconsin, or any other assistance/reimbursement for Childcare Expenses?     Yes     No

Are you, the care provider, receiving W2, State of Wisconsin, or any other assistance/reimbursement for this person's Childcare Expenses?     Yes     No

If yes, please provide the name of the source: \_\_\_\_\_

What is the **amount** and **frequency** of the childcare assistance/reimbursement? \_\_\_\_\_

**I certify that the above information is true and accurate to the best of my knowledge.**

<b>Signature of Childcare Provider</b>	<b>Date</b>