

Caroline Utter Fund - Loan Application

First Unitarian Society of Denver

1400 Lafayette Street Denver CO · 80218

Name of Applicant _____

Name of Spouse (if applicable) _____

Current Address _____

City _____ State _____ ZIP _____

Permanent Address (if different than current) _____

City _____ State _____ ZIP _____

Phone Numbers H: _____ W: _____ C: _____

Applicant's Date of Birth _____ Social Security Number _____

Driver's License Number _____ State _____

School Attending _____

City _____ State _____

Date (mo/year) first enrolled _____ Anticipated graduation date (mo/year) _____

Intended Degree _____ Current GPA _____

First year students, also provide the following (attach separate page if multiple schools):

High School / Previous School Attended _____

City _____ State _____

Program Studied _____ GPA _____ Date of Graduation _____

Amount of Loan Requested (max \$5,000) _____

Applicant Personal Statement: please tell us about your educational plans and your goals after you complete your program, your need for educational assistance, anything else you'd like us to know about your request for financial aid.

Applicant - Statement of Income and Expenses

Name of Applicant _____

*** Please include additional pages for relevant information that does not fit on this form.*

<u>APPLICANT INCOME</u> (gross)	Monthly	Annually
Applicant's Employment	_____	_____
Nature of employment _____		
Employer _____		
How Long at This Job? _____		
 Spouse's Employment	 _____	 _____
Nature of employment _____		
Employer _____		
How Long at This Job? _____		
 Savings	
Scholarships/Fellowships
Other Investments; Trusts of which You are the Beneficiary
Other Sources (relatives, friends, VA/employer benefits, etc)
 TOTAL INCOME	 _____	 _____

<u>APPLICANT EXPENSES</u>	Monthly	Annually
Tuition
Books/Supplies
Other Educational Expenses		
type _____
type _____
 Rent/House Payment	
Food
Clothing
Utilities, Telephone
Medical, Dental
Child Care
Entertainment
Loan Payment(s)
Credit Card payment(s)
Other Expenses _____
 TOTAL EXPENSES	 _____	 _____

Applicant - Statement of Assets and Obligations

Name of Applicant _____

*** Please include additional pages for relevant information that does not fit on this form.*

<u>APPLICANT ASSETS</u>	<u>\$\$ Value</u>
Applicant's Automobile
Make: _____ Model Year: _____	
Spouse's Automobile
Make: _____ Model Year: _____	
Bank Accounts (do NOT include account number)	
Bank _____
Bank _____
Investments (please list)	
_____
_____
Other Assets over \$500 in value	
_____
_____
Equity in Home
Equity in other real estate (please describe)

Equity in business enterprises (please describe)

TOTAL ASSETS	_____

<u>APPLICANT OBLIGATIONS</u>	<u>\$\$ Owed</u>
Educational Loans
Credit Cards (do NOT include account number)	
_____
_____
Other Loans (please list)	
Type _____
Type _____
Medical/Dental
Other Obligations over \$500 (please list)
TOTAL OBLIGATIONS	_____

Loan Co-Signer(s) - Statement of Income and Expenses

Name of Applicant _____

Name of Co-Signer(s) _____

Address _____

City _____ State _____ ZIP _____

Co-Signer #1: Social Security Number _____ Relationship to Applicant _____

Co-Signer #2: Social Security Number _____ Relationship to Applicant _____

*** Please include additional pages for information that does not fit on this form.*

<u>CO-SIGNER(S) INCOME</u> (gross)	Monthly	Annually
Co-Signer #1 Employment _____	_____	_____
Nature of employment _____		
Employer _____		
How Long at This Job? _____		
 Co-Signer #2 Employment _____	_____	_____
Nature of employment _____		
Employer _____		
How Long at This Job? _____		
 Savings _____
Investments, Trusts of which a Co-Signer is Beneficiary _____
Other Sources _____
 TOTAL INCOME	_____	_____

<u>CO-SIGNER EXPENSES</u>	Monthly	Annually
Rent/House Payment _____
Food/Household Expenses _____
Clothing _____
Utilities, Telephone _____
Medical, Dental _____
Child Care/Elder Care _____
Educational Expenses, other than those for Applicant _____
Loan Payment(s) _____
Credit Card Payment(s) _____
Other Expenses _____
 TOTAL EXPENSES	_____	_____

Loan Co-Signer(s) - Statement of Assets and Obligations

Name of Applicant _____

Name of Co-Signer(s) _____

CO-SIGNER ASSETS

Value

Vehicles (include automobiles, RVs, boats, etc.)

Make: _____ Model Year: _____

Make: _____ Model Year: _____

Make: _____ Model Year: _____

Bank Accounts (do NOT include account number)

Bank _____

Bank _____

Investment Accounts (please list)

_____

_____

Other Assets over \$500 in value

_____

_____

Equity in Home

Equity in other real estate (please describe)

_____

Equity in business enterprises (please describe)

_____

_____

TOTAL ASSETS

CO-SIGNER OBLIGATIONS

Total Owed

Educational Loans in Name of Co-Signer(s)

.....

Credit Cards (do NOT include account number)

.....

Other Loans (please list)

Type _____

Type _____

Medical/Dental

.....

Other Obligations _____

.....

TOTAL OBLIGATIONS

Co-Signer(s)

To the best of my knowledge, the information provided herein is complete and accurate and not misleading in any respect.

I have read and understand the terms and conditions that apply to a Caroline Utter Fund loan.

I understand that as a co-signer of this loan, any payments delinquent for more than 60 days from the borrower / student become immediately payable by the co-signers.

Signature of Co-Signer _____ Date _____

Signature of Co-Signer _____ Date _____

Applicant

To the best of my knowledge, the information provided herein is complete and accurate and not misleading in any respect.

I have read and understand the terms and conditions attached to this application Exhibit A that apply to a Caroline Utter Fund loan.

I understand that any loan re-payments that are delinquent for more than 60 days from me become immediately payable by the co-signers.

Signature of Applicant _____ Date _____