UC Berkeley, Office of the Registrar: Residence Affairs Unit
FINANCIAL INDEPENDENCE DOCUMENTATION CHECKLIST – Fall 2027

NAME: _____ **SID#:** _____

PLEASE NOTE: ALL OF THE FOLLOWING DOCUMENTS ARE REQUIRED FOR THE FINAL EVALUATION OF YOUR RESIDENCY CASE.

- Provide your Student ID number on the top right corner of each page.
- Obscure/white out/redact all Social Security and other account numbers but leave the last four digits of bank account/credit card numbers visible for identification purposes.
- Go to CalCentral.berkeley.edu, on "My Dashboard", under "Tasks" to upload these documents. If at all possible, please save and upload all documents in one PDF file.
- If you are unable to upload the documents, please email orres@berkeley.edu.

DEADLINES:

- Submit the SLR no later than **July 1, 2027**. The SLR will no longer be active in Cal Central after this date.
- The final date to submit supporting documents is July 15, 2027, after which if no documentation is provided, your case will be closed and your status will default to nonresident for tuition purposes.

☐ Income taxes for the following calendar year:

*** If no taxes were filed, include your signed and dated statement, "No State or Federal Income Tax returns were filed by me."*

	2026
Federal Taxes	☐
State Taxes	☐
W-2 Forms	☐

☐ A copy of your most recent pay stub showing year-to-date totals and earnings.

☐ List of places you have lived from August 2026 to August 2027 (Please include time frames and monthly rent amounts):

1. _____

2. _____

3. _____

4. _____

☐ Lease agreements for every place you have lived for the period mentioned above. **Lease agreements include your name, home address, lease period, and rent amount.**

☐ Proof of rent payments for every place you have lived for the period mentioned above.

* If you lived rent-free, please attach a statement indicating the dates you lived rent-free and explain the nature of your situation.

☐ List of all the institutions you have attended for the following academic year: 2026-2027

1. _____

2. _____

3. _____

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☐ Financial Aid Award Letters for the following academic year:

2026 - 2027

☐

☐ Tuition/Billing statements for the following academic year:

2026 - 2027

☐

☐ Please provide a completed biannual income and expense statement (next page).

☐ Do you have an irrevocable trust, such as a Minor Settlement, Special Needs Trust, Inheritance, Life Insurance Proceeds or Coogan Trust Account?

YES **NO**

☐ ☐

If **YES**, please complete the following 2 sections:

- Please provide the name and description of the irrevocable trust.

- Please submit the following documents:

  ☐ Documents showing the date the irrevocable trust was created.

  ☐ Documents indicating the account balance.

  ☐ Irrevocable trust account statements from August 2026 to the present.

  ☐ Verification that the irrevocable trust was used to pay for your fees, non-resident tuition, housing, and other costs associated with your education.

  ☐ If a lump sum was transferred to your everyday use account, please provide:

    ☐ Deposits received and the various payments made for your educational needs.

  ☐ If only dividends and/or interest were transferred to your everyday use account, please provide:

    ☐ Deposits received and the various payments made for your educational needs.

Biannual income/expense statement to show financial independence

Complete if you are an undergraduate under 24 and claim to be financially independent.
DO NOT complete if you: (1) are married, (2) are a veteran, (3) have legal dependents, OR (4) are a dependent of a California resident parent.
Please attach verification of **EVERY** expense and income item (for example rental agreements, financial aid award letters, most recent paystub showing year-to-date totals, W2s, vehicle repair costs, etc).

	INCOME	AMOUNT	EXPENSES	AMOUNT
Jan through June 2026	Work		Rent†	
	Financial Aid		Tuition	
	Gifts*		Vehicle	
	Parental Support*		Food‡	
	Irrevocable Trust**		*Other:*	
	*Other:**		*Other:*	
	TOTAL	0	TOTAL	0
July through Dec 2026	Work		Rent†	
	Financial Aid		Tuition	
	Gifts*		Vehicle	
	Parental Support*		Food‡	
	Irrevocable Trust**		*Other:*	
	*Other:**		*Other:*	
	TOTAL	0	TOTAL	0
Jan through June 2027	Work		Rent†	
	Financial Aid		Tuition	
	Gifts*		Vehicle	
	Parental Support*		Food‡	
	Irrevocable Trust**		*Other:*	
	*Other:**		*Other:*	
	TOTAL	0	TOTAL	0
July through Dec 2027	Work		Rent†	
	Financial Aid		Tuition	
	Gifts*		Vehicle	
	Parental Support*		Food‡	
	Irrevocable Trust**		*Other:*	
	*Other:**		*Other:*	
	TOTAL	0	TOTAL	0
Jan through June 2028 (est.)	Work		Rent†	
	Financial Aid		Tuition	
	Gifts*		Vehicle	
	Parental Support*		Food‡	
	Irrevocable Trust**		*Other:*	
	*Other:**		*Other:*	
	TOTAL	0	TOTAL	0

† If you have lived rent-free, please attach a statement explaining the nature of your situation.
‡ No documentation is required for food.
*Attach a statement explaining the nature of this income.

** Provide irrevocable trust documentation along with monthly statements since August 1, 2026.