



UBC STUDENT FINANCIAL PLANNING WORKSHEET

To get a clear financial picture during your studies at UBC, create a budget that considers both university and living costs. The asterisks (*) below indicate the timing of your UBC payments for tuition, on-campus housing, and meal plans. To check your fees and their due dates, visit www.students.ubc.ca/ssc.

Term 1 Budget (September to December)

| | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER |
|---|-----------|---------|----------|----------|
| INCOME | | | | |
| Savings + family contribution | | | | |
| Expected earnings from part-time work | | | | |
| Student loans (provincial + federal) | | | | |
| Scholarships, bursaries | | | | |
| Other: | | | | |
| Total income | | | | |
| EDUCATIONAL EXPENSES | | | | |
| Tuition and student fees (September instalment) | * | | | |
| Books | | | | |
| Additional costs (photocopies, field trips, etc.) | | | | |
| <i>Subtotal (Educational):</i> | | | | |
| LIVING EXPENSES | | | | |
| Rent/on-campus housing (Sept.), Meal plan (Nov.) | * | | * | |
| Utilities (phone, cable, Internet, hydro) | | | | |
| Groceries and household supplies (laundry) | | | | |
| Transportation (e.g., car payment, gas, carpool) | | | | |
| Personal (haircuts, clothing) + entertainment | | | | |
| Medical, dental, eye care | | | | |
| Loan, credit card payments | | | | |
| <i>Subtotal (Living)</i> | | | | |
| Total expenses (Educational + Living) | | | | |
| INCOME – EXPENSES | | | | |
| (Carry forward surplus to next month's income) | | | | |

Term 2 Budget (January to April)

JANUARY

FEBRUARY

MARCH

APRIL

INCOME

| | | | | |
|---------------------------------------|--|--|--|--|
| Savings + family contribution | | | | |
| Expected earnings from part-time work | | | | |
| Student loans (provincial + federal) | | | | |
| Scholarships, bursaries | | | | |
| Other | | | | |
| Total income | | | | |

EDUCATIONAL EXPENSES

| | | | | |
|---|---|--|--|--|
| Tuition and student fees (January instalment) | * | | | |
| Books | | | | |
| Additional costs (photocopies, field trips, etc.) | | | | |
| <i>Subtotal (Educational)</i> | | | | |

LIVING EXPENSES

| | | | | |
|--|---|--|--|--|
| Rent/on-campus housing | * | | | |
| Utilities (phone, cable, Internet, hydro) | | | | |
| Groceries and household supplies (laundry) | | | | |
| Transportation (e.g., car payment, gas, carpool) | | | | |
| Personal (haircuts, clothing) + entertainment | | | | |
| Medical, dental, eye care | | | | |
| Loan, credit card payments | | | | |
| Subtotal (Living) | | | | |
| Total expenses (Educational + Living) | | | | |

INCOME – EXPENSES

(Carry forward surplus to next month's income)

| | | | | |
|--|--|--|--|--|
| | | | | |
|--|--|--|--|--|