



FINANCIAL HARDSHIP WITHDRAWAL WORKSHEET

Complete the following worksheet (Items 1-8) as evidence of financial hardship and the funds needed to meet your hardship. Sign and date the lower portion of the form, and return it, along with your Affidavit of Financial Hardship to your campus benefits office.

1. Total cost of medical bills, tuition, mortgage, rent, primary residence, funeral expenses or home repair	\$ _____
2. Available amount of loans from commercial resources (e.g., personal loans, home equity loans, mortgage)	\$ _____
3. Available amount of liquid assets	
• Bank accounts	
• Money market accounts	
• CDs	
• Stocks, bonds, real estate or other investments	\$ _____
4. Available amount of nontaxable loans from the Research Foundation Optional Retirement Plan (TIAA-CREF GSRA only)	\$ _____
5. Available amount of reimbursement or compensation by insurance (e.g., reimbursement through medical insurance or homeowners)	\$ _____
6. Total Financial Need (Line 1 – (Lines 2+3+4+5))	\$ _____
7. Estimated taxes on withdrawal amount	\$ _____
8. TOTAL PERMITTED HARDSHIP WITHDRAWAL (Lines 6+7) Enter this amount on the Affidavit of Financial Hardship	\$ _____

I represent that

- I completed this worksheet to the best of my knowledge,
- All of the numbers contained herein are true and accurate as of the date stated below, *and*
- I cannot obtain the necessary funds needed to meet my hardship from the above sources.

Employee's Signature

Date