

Third Marine Division Association – Memorial Scholarship Fund (MSF)
Application for the 2019-2020 Academic Year – Due no later than April 15, 2019
All information must be completed or marked n/a, in black or blue ink, printed legibly or typed

Section A – Student Applicant Information

Name _____
 Title: Mr. Ms. _____ DOB: (Month, day, year) _____ SSN (last 4 only) XXX-XX-_____
 Email: _____ Cell phone: _____
 Permanent Home Address: _____ Other phone: _____

- _____
- _____

During the 2019-2020 academic year Applicant requests financial aid from (Mo/Yr) _____ through _____ while attending:

- School Name, city state: _____
- Financial Aid Office's formal name (e.g. Bursar, Office of Financial Aid) and Mailing Address: _____
- _____
- _____

Academic Major **or** Undecided _____ Expected Gradation Date (Mo/Yr) _____

Applicant's Employment/Occupation for Summer: June – August 2019 and School Year: September 2019 – May 2020:
 Summer: _____

School year: _____

Applicant has applied for or received federal, state or private student loans for these academic years:

- Estimate for 2019-2020 (Detailed below): \$ _____ Actual Received for 2018-2019: \$ _____

School(s) previously attended as of the date of this application dates from (mo/year) to (mo/year): _____

Applicant's Estimates for 2019-2020

<u>Applicant's Income and Funds</u>	<u>2019-2020</u>	<u>School cost estimate:</u>	<u>2019-2020</u>
Summer work income Jun-Aug	\$ _____	Per attached document	\$ _____
School year work income Sept-May	_____	Tuition	_____
Cash, savings, investments	_____	Mandatory Fees	_____
Total	\$ _____	Room and Board (Note a)	_____
		Books & Supplies	_____
<u>Sources of Funds for Education:</u>		Transportation (Note a)	_____
Scholarships/Grants - School	_____	Other- Detail Below	_____
Scholarships/Grants - Other	_____		_____
Student Loans - Federal & State	_____		_____
Student Loans - Private	_____	Total	\$ _____
Financial Aid/Grants - Federal	_____		
Financial Aid/Grants - State	_____		
Financial Aid/Grants - Other	_____		
Family contribution (same as Page 2)	_____		
Other funds	_____		
Total	\$ _____		

Note a: These costs are only for students attending school away from their legal residence which requires significant travel to reach the school. Students living at home or commuting shall not list these costs. Transportation is for travel **to and from home** for the school year and official breaks, i.e. for holidays.

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Section B – Sponsor and Family Information

The **SPONSOR** can be a parent, grandparent, great grandparent or the legal guardian of the applicant and must be a Third Marine Division Association member in good standing for at least two (2) consecutive years immediately prior to the date of the first MSF application and continue such membership for the entire period of the applicant's assistance under the MSF program. **The Eligibility Requirements are on pages 6-7.** Enter the following information.

SPONSOR – Applicant is sponsored by the following person who is an Association Member:

Name: _____ Relationship: _____
(Parent, grandparent, great grandparent or guardian)

Telephone _____ Email _____

Address: _____

Third Marine Division Association Member check one: Annual ___ OR Life ___ Member # _____

Note: You can find your Member number on the Caltrap mailing label or contact the Assn Mgr 215-822-9094

Family Information

If married: Spouse's Name _____

Address if not the same as applicant. _____

Parent #1 (or Guardian) - Name _____

Mailing Address _____

Cell Phone _____ Other Phone _____

Email Address _____

VA Certified Service Connected Disability? Circle one: Yes No. **If Yes, Percent** _____%

Parent #2 (or Guardian) - Name _____

Mailing Address _____

Cell Phone _____ Other Phone _____

Email Address _____

VA Certified Service Connected Disability? Circle one: Yes No. **If Yes, Percent** _____%

Family Contribution What amount will the parent/guardian contribute to the Applicant for the 2019-2020 school academic year costs? \$_____ (Should be the same as on Page 1 "Family Contribution")

Applicant's siblings/step siblings or Married applicant's children (Attach a separate sheet if required)

Names, ages and school name and year (Grades 1-8, Fr So Jr Sr Grad) if applicable. **Note if they have been past MSF awardees.**

Divorced, separated or remarried parents (Complete if applicable) or Circle: **N/A**

Year of separation or divorce _____ Who claimed Applicant as a dependent on their 2018 tax return: _____

Court ordered or voluntary support \$ _____ per month. When will support end, (mo/year) _____

Other parent's name _____ Will they contribute to Applicant for 2019-2020? \$ _____

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Parent/Guardian Financial Data, 2018 Actual 2019 Estimated:

Income - Actual 2018 per tax return, Estimated for 2019:

	<u>2018 Actual</u>	<u>2019 Estimate</u>	
Adjusted Gross Income from IRS Form 1040	\$ _____	\$ _____	IRS Form 1040 Page 2, Line 7
Non Taxable VA Disability	_____	_____	Per VA letter
Tax exempt interest	_____	_____	IRS Form 1040 Page 2, Line 2a
Tax exempt dividends	_____	_____	IRS Form 1040 Page 2, Line 3a
Non Taxable IRA Pensions & Annuities	_____	_____	IRS Form 1040 Page 2, Line 4a
Non Taxable social security benefits	_____	_____	IRS Form 1040 Page 2, Line 5a
 Total	 \$ _____	 \$ _____	

Financial Assets – as of the date of this application signed on page 5

Assets:

Cash, savings, checking	\$ _____
Net worth of investments	_____
Net worth of business/farms	_____
College 529 Savings Plan	_____
IRA, 401(k), 403(b), or 457	_____
Roth IRA or Roth 401(k)	_____
Total Assets	\$ _____
 Home(s) Fair market value	\$ _____
Mortgage amount	_____
Net Home Value	\$ _____
 Mortgage Payment monthly, OR	\$ _____
Rent payment monthly	\$ _____

Net worth is Fair Market Value less related debt and amounts owed on the asset

Explain below or attach as a separate statement any explanations or amplification concerning the parents' financial information above that would give more insight for the Board of Trustees in their evaluation process.

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Student's Financial Data, 2018 Actual 2019 Estimated:

Is Student married?: Circle one: Yes No

If married enter the combined data for the student and spouse below from their Joint Tax return or Separate tax returns.

Income 2018 per tax return, Estimated for 2019:

	<u>2018 Actual</u>	<u>2019 Estimate</u>	
Adjusted Gross Income	\$ _____	\$ _____	IRS Form 1040 Page 2, Line 7
Non Taxable Income - List below	_____	_____	
-	_____	_____	
-	_____	_____	
-	_____	_____	
Total Income	<u>\$ _____</u>	<u>\$ _____</u>	

Financial Assets – as of the date of this application on page 5

<u>Assets:</u>		<u>Liabilities:</u>	
Cash, savings, checking	\$ _____	Student loans federal & state	_____
College 529 Savings Plan (Student's)	_____	Student loans private	_____
Other Assets - list below	_____	Other Loans - list below	_____
	_____		_____
	_____		_____
Total Assets	<u>\$ _____</u>	Total Loans	<u>\$ _____</u>

Explain below or attach as a separate statement any explanations or amplification concerning the Student's financial information above that would give more insight for the Board of Trustees in their evaluation process.

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Section C - Required Documents to be submitted with this application. **Please delete all Social Security Numbers** from all documents submitted

First time applicants only:

- Copy of birth certificate or adoption papers.
- Most recent transcript, Fall 2018 original copy in a school secure envelope or email see Section D 5. below.
- Copy of 2019-2020 school acceptance or enrollment letter
- Married applicants. Copy of a marriage license that is a document issued, either by a church or state authority, authorizing a couple to marry.
- Recently discharged Marines, a copy of Form DD-214.

All applicants:

- Copy of the school's financial award letter summarizing the financial aid to be received by the student.
- Copy of the school's annual cost of attendance detailed by line item for the school year (tuition, fees, room & board, books, supplies). This should be the same for "School Cost" on page 1.
- A copy of the Applicant's "Free Application for Federal Student Aid" (**FAFSA**) form for the 2019-2020 year as filed. Note: this form should be completed as soon as possible after January 1, 2019. <https://studentaid.ed.gov/sa/fafsa>
- For prior year 2018-2019 MSF awardees if they have not done so, the Fall 2018 transcript report see D 5. below.

Section D – Agreement between the Applicant and MSF and Contact Information

1. We attest that the Applicant named in this form is fully qualified to receive assistance from the Third Marine Division Association's Memorial Scholarship Fund (MSF) as the legally dependent child, grandchild or great-grandchild of a member of the Association OR a recently discharged Marine as described below in Section E 5. with at least two full years of continuous membership as of the date of this application.
2. We attest by our signatures below to the truthfulness and completeness, as known to us, of all answers regarding "Estimated Costs" for the school to be attended and to the "Financial Assets", "Income" and "Estimated Income" sections of this Application. We agree to promptly provide any such additional information or clarification relevant to school costs, living arrangements, supplies, fees, transportation, personal expenses, etc., as may be requested
3. We agree to promptly advise the Secretary of the MSF Board of Trustees of any changes to this Application as originally submitted, and particularly any changes to the financial information regarding "Income" as submitted herein such as new scholarships, State and/or Federal grants/awards, etc
4. We agree to immediately notify the MSF Secretary if the Applicant, for any reason, fails to start school as indicated on this Application, withdraws from the indicated school after an award check has been mailed to the indicated institution, or transfers to a school other than the one indicated in this Application.
5. We agree that semester grade reports will be sent to the Secretary, MSF after the end of each semester to verify continued academic performance (**Cumulative GPA of 2.5 or higher**) and that semester grade reports must be original official documents from the educational institution which includes secure/encrypted emails from the school registrar sent to the MSF Secretary via email. On-line printouts or copies are unacceptable. Grade reports from the educational institution must show the student's name, semester GPA and cumulative GPA.
6. **We also agree to submit a new Application annually for any future year MSF assistance** request by the Applicant, such Applications to be used by the MSF Board of Trustees to determine on-going "need." We acknowledge that the MSF Board of Trustees, Third Marine Division Association, retains total and complete control and determination of award recipients, award amounts, and related decisions, and their findings are final and binding, without recourse or appeal for such actions by any person or group.
7. Award recipients will provide the Secretary, MSF their School mailing address and e-mail address they are attending within two weeks of the start of the Fall 2018 Semester.
8. Review the Eligibility Requirements on pages 6 & 7 before signing, which constitutes your acceptance of this agreement section having read it in its entirety.

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Signatures agreeing to the preceding paragraphs 1. through 8.

- Applicant _____ Date _____
- Father/Step/Guardian _____ Date _____
- Mother/Step/Guardian _____ Date _____

Return this completed application with the Section C required documents by **US Mail (Must be received no later than April 15, 2018)** to:

Patrick J. Conroy
MSF Secretary
PO Box 2296
Stow, OH 44224

Direct questions or comments to the MSF Secretary's email at ConroyPJ11@aol.com

Section E - Eligibility Requirements:

To be considered eligible for a financial award based on need an applicant must meet the following specific criteria of eligibility and compliance:

1. A child, grandchild, great-grandchild or legal dependent of any personnel who lost their lives as a result of hostile enemy action while a member of or attached to a unit of the Third Marine Division (Reinf) in "Military Operations" as defined below OR
2. A child, grandchild, great-grandchild or legal dependent of any honorably discharged personnel deceased or retired having been a member of or attached to a unit of the Third Marine Division (Reinf) in Military Operations whose post service death has been certified by the Department of Veterans Affairs to have been the result of hostile enemy action or other disabilities incurred and were not the result of any misconduct by the veteran. OR
3. A child, grandchild, great-grandchild or legal dependent of a deceased member of the Association or the spouse of such member, provided the deceased member had held Association membership for a period of at least two (2) consecutive years immediately prior to his or her death OR
4. A child, grandchild, great-grandchild or legal dependent of a living member (sponsor) of the Association, provided the sponsoring member has held Association membership for a period of at least two (2) consecutive years immediately prior to the date of eligible applicant's first application for assistance OR
5. Any personnel who has been recently honorably discharged having been a member of or attached to a unit of the Third Marine Division (Reinf) provided the person has held Association membership for a period of at least two (2) consecutive years immediately prior to the date of the first application, be current on all annual dues payments and who continues his or her membership for the entire period of their financial assistance.
6. "Military Operations" is defined as the involvement of any unit of the Third Marine Division (Reinf) in Vietnam, or in military operations designated as Desert Storm, Desert Shield, Iraqi Freedom, Enduring Freedom and in the countries of Southwest Asia defined for this purpose as Lebanon, Oman, Qatar, Iran, United Arab Emirates, Yemen, Afghanistan, Bahrain, Israel, Iraq, Saudi Arabia, Turkey, Kuwait, Syria, Cyprus and Jordan. Also, military operations conducted by order of the President of the United States anywhere throughout the world.
7. Applicants shall be unmarried or married and between the ages of sixteen (16) and twenty-three (23), both ages inclusive, as of the date of the original application for assistance. NOTE: If an applicant is applying per section E 5. above as recently discharged personnel the Fund President will determine the maximum age limit based on the applicant's circumstances.

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8. Applicants shall complete annually in its entirety the application form with all required support documents to be received by the Secretary of the MSF Board of Trustees on or before the due date for each school year as declared. Each school year requires a new application to be submitted. Awards will only be given and/or continued provided the applicant maintains academic and conduct standards satisfactory to the educational institution attended and to the Fund's Trustees and demonstrates the need for financial assistance. No post-graduate financial assistance will be granted.
9. Applicants shall have a minimum cumulative Grade Point Average (GPA) of 2.50 or higher at the time of the initial application; and shall maintain a minimum cumulative Grade Point Average (GPA) of 2.50 or higher to demonstrate academic proficiency and continue in the program and will only be given and/or continued provided the applicant maintains academic and conduct standards satisfactory to the educational institution attended and to the Fund's Trustees.
10. Awards may be awarded for any approved course of study in an accredited college or university, or for any approved course of study in an accredited and approved post-high school trade school institution. Awards will not be given in excess of four (4) years of undergraduate study except for those accredited degree programs where the undergraduate requirement is at least 150 credit hours or five (5) years of undergraduate study for graduation. No post-graduate assistance will be granted. Applicants must be enrolled in each semester for not less than twelve (12) credit hours.
11. The student is responsible to ensure grade reports are submitted to the MSF Secretary after the end of each semester on a timely basis by the student's educational institution (even if the student has graduated) and must be issued directly from the institution. Semester grade reports must be original official documents directly from the educational institution, which includes secure/encrypted emails from the school registrar sent to the MSF Secretary's email. Online printouts or copies are unacceptable. Grade reports from the educational institution must show the student's name and ID number, semester GPA and cumulative GPA.

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