

Third Marine Division Association – Memorial Scholarship Fund (MSF)
Application for the 2021-2022 Academic Year – Due no later than April 16, 2021
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 2021-2022 academic year Applicant requests financial aid from (Mo/Yr) _____ through _____ while attending:

- School Name, city state: _____
- Financial Aid Office Mailing Address: _____
- _____
- Student ID Number (If assigned) _____

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

Applicant's Employment/Occupation for the following months:

Summer June – August 2021: _____

School year September 2021 – May 2022: _____

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

- Estimate for 2021-2022 (Detailed below): \$ _____ Actual Received for 2020-2021: \$ _____

Applicant's Estimates for 2021-2022

<u>Applicant's Income and Funds</u>	<u>2021-2022</u>	<u>School cost estimate:</u>	<u>2021-2022</u>
Summer work income Jun-Aug	\$ _____	Per attached document:	
School year work income Sept-May	_____	Tuition	\$ _____
Total Assets from Page 4	_____	Mandatory Fees	_____
Total	\$ _____	Room and Board (Note a)	_____
		Books & Supplies	_____
<u>Sources of Funds for 2020-2021 Education:</u>		Transportation (Note a)	_____
Scholarships School	_____	Other- Detail Below	_____
Scholarships Other	_____		_____
Student Loans - Federal & State	_____		_____
Student Loans - Private	_____	Total	\$ _____
Financial Aid/Grants - Federal e.g. Pell	_____		_____
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, or recently discharged 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. 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, Self)

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 2021-2022 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, school name and year (Grades 1-8, Fr So Jr Sr Grad) if applicable. Note if they have been past MSF applicants.

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 2020 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 2021-2022? \$ _____

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Parent's Financial Data, 2020 Actual 2022 Estimated:

	<u>2020</u> <u>Actual</u>	<u>2021</u> <u>Estimate</u>	
Adjusted Gross Income from IRS Form 1040	\$ _____	\$ _____	IRS Form 1040 Line 11
Plus:			
Non Taxable VA Disability	_____	_____	Per VA letter
Tax exempt interest	_____	_____	IRS Form 1040 Line 2a
Tax exempt dividends	_____	_____	IRS Form 1040 Line 3a
Non Taxable IRA distributions	_____	_____	IRS Form 1040 Line 4a
Non Taxable Pensions & Annuities	_____	_____	IRS Form 1040 Line 5a
Non Taxable social security benefits	_____	_____	IRS Form 1040 Line 6a
Total Of Lines Above	<u>\$ _____</u>	<u>\$ _____</u>	

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

Assets:

Student Loans

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	<u>\$ _____</u>

Student loans federal	\$ _____
Student loans state	_____
Student loans private	_____
Total Student Loans	<u>\$ _____</u>

(Separate from student's 529 on page 4)

Homes' Fair market value	\$ _____
Mortgage amount	_____
Net Home Value	<u>\$ _____</u>

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

Mortgage Payment monthly, OR	\$ _____
Rent payment monthly	\$ _____

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, 2020 Actual 2022 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 - Actual 2020 per Form 1040 tax return, Estimated for 2021:

	2020	2021	
	Actual	Estimate	
Adjusted Gross Income	\$ _____	\$ _____	IRS Form 1040 Line 11
Non Taxable Income - List below	_____	_____	
-	_____	_____	
-	_____	_____	
-	_____	_____	
Total Income	\$ _____	\$ _____	

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

<u>Assets:</u>		<u>Student Loans</u>	
Cash, savings, checking	\$ _____	Student loans federal	\$ _____
College 529 Savings Plan (Student's)	_____	Student loans state	_____
Other Assets - list below	_____	Student loans private	_____
	_____		_____
Total Assets enter on Page 1	\$ _____	Total Student Loans	\$ _____

(Separate from parents' 529 on page 3)

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. Attached a note if you wish to be returned or shredded.
- Most recent transcript, **Spring 2021** original in a school secure mailed envelope or email see Section D 5. below.
- Copy of 2021-2022 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. Attached a note if you wish to be returned or shredded.
- Recently discharged military personnel, a copy of Form DD-214. Attached a note if you wish to be returned or shredded.

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 letter 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**) for the 2021-2022 year as filed. Note: this form should be completed as soon as possible after January 1, 2021. <https://www.ed.gov/news/press-releases/department-launches-2021-22-fafsa-cycle>
- For prior year 2020-2021 MSF applicants if they have not already done so, the **Spring 2021** transcript in a school secure mailed envelope or email see Section D 5. below.

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

1. We attest that the Applicant 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 military personnel per Section E.5. on page 6.
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.
3. We agree to immediately advise the Secretary of the MSF Board of Trustees of any changes to the "Financial Assets", "Income" and "Estimated Income" sections of this Application.
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 when each semester's grades are finalized to verify continued academic performance (Cumulative GPA of 2.5 or higher) and that semester grade reports must be either (A) original official mailed documents from the educational institution or (B) secure/encrypted emails from the school registrar sent to the MSF Secretary via email. On-line printouts or copies are unacceptable. Grade reports must show the student's name, student ID number, semester GPA and cumulative GPA.
6. We also agree to submit a new Application annually for any future year MSF assistance. 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. 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 Section D paragraphs 1 through 7.

- 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 16, 2021)** 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 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 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 e.g. US Navy Hospital Corps, 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 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 MSF President will determine the maximum age limit based on the applicant's circumstances.

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8. Each school year requires a new application to be submitted.
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.
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.

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