



# Karl J. Schwartz Rotary Award Fund Scholarship Program

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## THE PROGRAM

Bristol Rotary Scholarship Fund, Inc. established a scholarship program to assist high school seniors from select Connecticut towns who plan to pursue full-time postsecondary study at an accredited four-year institution of the student's choice.

This scholarship program is administered by Scholarship America®, the nation's largest designer and manager of scholarship, tuition assistance and other education support programs for corporations, foundations, associations and individuals. Awards are granted without regard to race, color, creed, religion, sexual orientation, age, gender, disability or national origin.

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## ELIGIBILITY

Applicants must meet all of the following criteria:

- Be graduating high school seniors who reside and attend public or private high schools in one of the following towns in Connecticut: Bristol, Burlington, Plainville, Plymouth, Southington, or Terryville.
  - Plan to enroll in full-time undergraduate study at an accredited four-year college or university for the entire upcoming academic year.
  - Submit an essay describing their personal experiences as they relate to the Rotary motto, "Service Above Self".
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## AWARDS

Up to ten (10) awards will be granted. If selected as a recipient, each student will receive an initial award of \$8,000. Awards may be renewed for up to three (3) additional years or until a Bachelor's degree is earned, whichever occurs first. Renewal awards of up to \$8,000 per year are subject to the performance of the Karl J. Schwartz Scholarship fund. Renewals are also contingent on the student maintaining a 3.0 GPA (on a scale of 4.0) and continuing to demonstrate financial need. Renewal students will be required to submit financial information to Scholarship America each year. If financial need is not demonstrated in subsequent years, the renewal award will be forfeited.

Awards are for undergraduate study only.

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## APPLICATION

Students must complete an on-line application at: <https://learnmore.scholarsapply.org/bristolrotary> and submit it along with a current, complete transcript of grades by **March 2, 2022**. Grade reports are not acceptable. Online transcripts must display student name, school name, grade and credit hours earned for each course and term in which each course was taken. Applicants will receive acknowledgment of receipt of their application. If an acknowledgment email is not received within three weeks, applicants may call Scholarship America to verify that the application has been received.

Applicants are responsible for gathering and submitting all necessary information. Instructions for completing the Financial Data section of the application are included. Applications are evaluated on the information supplied; therefore, answer all questions as completely as possible. Incomplete applications will not be evaluated. All information received is considered confidential and will be reviewed only by Scholarship America and Bristol Rotary Scholarship Fund, Inc. officials for purpose of evaluating the application and verifying applicant eligibility.

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### **SELECTION OF RECIPIENTS**

Scholarship recipients are selected on the basis of academic record, demonstrated leadership and participation in school and community activities, honors, work experience, statement of goals and aspirations, unusual personal or family circumstances, an outside appraisal, an essay, and financial need. Recipients will be selected from a pool of qualified applicants with consideration given to financial need.

Selection of recipients is made by Scholarship America. In no instance does any officer or board member of Bristol Rotary Scholarship Fund, Inc. play a part in the selection process except to verify eligibility of applicants. All applicants agree to accept the decision as final.

Applicants will be notified in late April. Not all applicants to the program will be selected as recipients.

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### **PAYMENT OF SCHOLARSHIPS**

Scholarship America processes scholarship payments on behalf of Bristol Rotary Scholarship Fund, Inc. Payment is made in one installment in early August. Checks are mailed to each recipient's home address and are made payable to the school for the student.

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### **OBLIGATIONS**

Recipients have no obligation to Bristol Rotary Scholarship Fund, Inc. They are, however, required to notify Scholarship America of any changes in address, school enrollment, or other relevant information and to send a complete transcript when requested.

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### **REVISIONS**

Bristol Rotary Scholarship Fund, Inc. reserves the right to review the conditions and procedures of this scholarship program and to make changes at any time including termination or suspension of the program.

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### **ADDITIONAL INFORMATION**

Questions regarding the scholarship program should be addressed to:

**Karl J. Schwartz Rotary Award Fund Scholarship Program**  
Scholarship America  
One Scholarship Way  
Saint Peter, MN 56082

[kevenson@scholarshipamerica.org](mailto:kevenson@scholarshipamerica.org)

Telephone: (507) 931-1682

# INSTRUCTIONS FOR COMPLETING THE FINANCIAL DATA SECTION OF THE APPLICATION

The Financial Data section of the application should be completed by the parent or guardian of the applicant. Information should be from a completed tax return or based on estimated information to be filed with the IRS.

1. **State of Residence** is the state where the parent(s) reside and pay state income tax.
2. **Adjusted Gross Income** can be found on IRS FORM 1040 and is gross income reduced by specific adjustments allowed by law.
3. **Total Federal Tax Paid** includes the total amount of **federal** income tax to be paid as reported on IRS FORM 1040. This is **not** the amount withheld from employee's paychecks. (The amount withheld should be adjusted by any refund or additional taxes due.) Do **not** report state income tax.
4. **Total Income** of parent(s) should be reported individually. Provide information for both natural parents, when possible. **If the student resides with only one parent**, financial information **must** be received from the parent who claims the child as a dependent for tax purposes. If a parent has remarried, the spouse's information is required if the spouse is a legal guardian of the student, or claims the student as a dependent, or the student is included in the spouse's benefit plan. **If necessary, two Financial Data sections may be submitted by the student.** A copy of the Financial Data section may be made in order for one to be completed by each parent.
5. **Untaxed Income and Benefits** include any other income or benefits not included in the adjusted gross income figure. Do not include untaxed contributions to retirement plans.
6. **Medical and Dental Expenses** include only those expenses not paid by insurance. Do not include premium payments.
7. **Total Cash, Checking, Savings, Cash Value of Stocks, etc.**, includes liquid assets that can be used for educational expenses. **Do not include** IRA, 401k, or other retirement plan funds.
8. **Total number of family members** living in the household and primarily supported by the reported income may include:
  - the applicant
  - the applicant's parents
  - other children living in the household
  - dependent college students living away from home
  - other people who live in the household and receive more than half of their support from the reported income
9. **Marital status** is the current status of the person from whom the financial information is submitted.
10. **Of the total number of family members on line 8, number of students attending college** includes family members attending a two- or four-year college, university, or vocational-technical school at least half-time. Include the applicant in this number. Do not include parents.

**NOTE:** Any exceptions to providing financial information as instructed above must be submitted to Scholarship America in writing.