

WINCHESTER SCHOLARSHIP FOUNDATION (WSF) APPLICATION
FOR ACADEMIC YEAR 2023-2024
GENERAL INFORMATION AND INSTRUCTIONS - PINK FORM

The Winchester Scholarship Foundation annually awards grants to young people needing assistance in their post-High School education (see eligibility below). If there is a gap between our estimate of a fair share of your resources and the yearly costs of the school or college you choose, the Foundation hopes to assist you based on the funds available from annual donations and endowments. Scholarships have historically ranged from \$500 to \$6,000, averaging around \$3,000.

The Foundation will award aid even if a student is receiving scholarships from several other sources, unless it appears that a student has enough resources in combination with parents to meet the costs of the institution chosen. Foundation scholarships frequently are used to reduce inordinate amounts of loans or campus work, provided the WSF award does not cause the institution to lower its award package as a result.

The following are eligible to apply:

1. Students now at Winchester H.S. graduating in June.
2. Winchester residents who will graduate in June from one of the following: a) Northeast Regional Vocational/Technical H.S. or Minuteman Tech (Lexington); b) another secondary school that is an approved Special Education Outside Placement Program under provisions of Chapter 766; or c) any secondary school approved under the "school choice" program in any year in which the Winchester Public Schools are participating in that program (note that this has not happened in recent years).
3. Graduates of Winchester H.S. who are sophomores, juniors, or seniors at college, or who did not go to college directly after high school.
4. Graduates of one of the above schools as described in #2, currently Winchester residents, who are sophomores, juniors, or seniors at college, or who did not go directly to college after graduation.

In very rare situations of need, an exception may be made to criteria #1-4 above. Awards are not made to those for attendance at private preparatory schools.

Because the main criterion in making awards is the demonstrated need of the student, applicants and their parents will be asked to submit financial information in detail. Parents and students are assured that all information will be held in complete confidence. Only the five members of the Scholarship Committee and the Aid Advisor will see the documents that applicants and parents submit. These documents will be destroyed after five years.

All Members of WSF, the Scholarship Committee, and the Aid Advisor contribute their time on a voluntary basis. They expect you, the applicant and parents, to respond by submitting complete and truthful information on time.

LATE SUBMISSIONS OF FORMS OR FAILURE OF EITHER PARENT TO PROVIDE FINANCIAL INFORMATION AS REQUESTED WILL LIKELY RESULT IN DENIAL OF AID.

Graduating seniors will be notified of the Committee's decision by **July 31**. Those already in college will be notified by **August 31**. Any student who changes choice of school or receives any previously undisclosed award(s) must notify the Chairperson immediately in writing, disclosing all details. Failure to do so may result in the withholding or withdrawal of an award. The Committee also reserves the right to change an award if a student's expenditures appear inconsistent with his/her declaration of limited means (for example, new car, extensive travel, etc.).

SEPARATED OR DIVORCED PARENTS

If parents are separated, divorced, or re-married, the parent (and step-parent, if any) with whom the student lives are considered the custodial parent(s) and are responsible for completion of the parents' section of the WHITE application form. In such situations, an additional WHITE form should be sent to the other parent (the non-custodial parent), who should complete the parents' section starting with item 11 and mail it (with the required tax forms) directly to the Chairperson by the deadline.

SUMMARY OF APPLICATION PROCEDURE

THE PROCEDURE FOR APPLYING FOR SCHOLARSHIP AID IS OUTLINED BELOW AND EXPLAINED IN DETAIL ON THE FOLLOWING PAGES:

Step	Form	Description	Deadline
WHS GRADUATING SENIORS			
Step 1	WHITE FORM	Submission of <u>WSF Aid Application</u> with required tax documents	May 31
Step 2	YELLOW FORM	Submission of <u>Report by Institution</u> request to your selected school <i>and completion and return of the form by the Financial Aid Office of your selected school direct to the Chairperson of the WSF</i>	May 31
STUDENTS NOW IN COLLEGE			
Step 1	WHITE FORM	Same as above	June 15
Step 2	YELLOW FORM	Same as above	July 15
Step 3	TRANSCRIPT	Order official transcript as soon as full year's grades are available to be sent <i>direct</i> to the Chairperson of the WSF by your Registrar	June 30

MAILING ADDRESS FOR ALL APPLICATION FORMS

Stephanie Altavilla
 Chairperson, Winchester Scholarship Committee
 6 Royalston Ave
 Winchester, MA 01890
 wsfoundchair@gmail.com

Please send all forms or requests by regular mail only or by email. Please do not send by registered mail and do not hand deliver

For questions about the Foundation or the application process, please email wsfoundchair@gmail.com or mail to the above address.

wsfoundclassof2024@gmail.com
 wsfoundclassof2025@gmail.com
 wsfoundclassof2026@gmail.com
 wsfoundclassof2027@gmail.com

For questions about award payments, please email
 wsfoundtreasurer@gmail.com

IMPORTANT: THE FINANCIAL AID OFFICE AT YOUR CHOSEN SCHOOL MUST HAVE THE YELLOW FORM (WITH SECTION A COMPLETED BY YOU) AS SOON AS POSSIBLE IN ORDER TO RETURN IT IN TIME.

DON'T DELAY!

WINCHESTER SCHOLARSHIP FOUNDATION APPLICATION PROCEDURES

PARENTS

1. It is necessary for parents to file whatever aid forms are requested by the institution(s) the applicant may attend, as the Committee expects to receive information about family ability to pay directly from the institution you select on the YELLOW form (Report by Institution).
2. Complete and submit the PARENTS' (FAMILY) SECTION of the WHITE FORM (Aid Application), questions 10-16, as soon as you have completed your US Form 1040. Attach a signed photocopy of your tax return and a copy of each of your W-2 Forms and return the WHITE FORM to the Chairperson by the deadline indicated on the form.
3. If parents are separated, divorced, re-married, or file separately, each parent should complete the PARENTS' (FAMILY) SECTION of the application (WHITE FORM) with his/her tax forms. The student need only complete the STUDENT'S section of the form completed by the custodial parent with whom he/she lives.
4. If parents are filing for an extension and Form 1040 is not yet available, please submit a signed copy of the previous tax year Form 1040 plus W-2 Forms.
5. If your family or financial situation changes after you complete the WHITE FORM, please report the circumstances in writing to the Chairperson immediately.

HIGH SCHOOL STUDENTS

1. Complete questions 1-9 and 16 of the WHITE FORM (Aid Application). If you filed a Form 1040, attach a copy; also attach copies of any W-2 Forms which you have received. A good hint is to do all this well ahead of time so that your parents may also complete their section and get it back to the Chairperson early, but under no circumstances later than the deadline.
2. As soon as you definitely know the institution you will attend, complete your part of the YELLOW FORM (Report by Institution Student Will Attend). Rush the YELLOW FORM to the Aid Officer at that school (unless you have received a "denial letter") and request that it be returned to the Chairperson no later than the deadline. The sooner this happens, the better, since we must have your YELLOW FORM in order for your aid application to be considered. It is your responsibility to get your elected college to return this YELLOW FORM back to us!
3. The Committee will notify you of its decision by **July 31**.

STUDENTS NOW IN COLLEGE

1. Complete questions 1-9 and 16 of the WHITE FORM (Aid Application) and attach or copies of your Tax Return and W-2 Forms. Get the WHITE FORM to your parents early (one WHITE FORM each if your parents are separated or divorced) because they must complete their section and return the entire completed form to the Chairperson **no later than June 15**.

NOTE: If your G.P.A. is below 2.00, attach a letter that will assist the Committee in justifying further awards.

2. As soon as the full year's grades are available, order an official transcript and ask that it be sent directly to the Chairperson by your Registrar to be received **no later than June 30**. It is your responsibility to see that we receive this transcript on time!
3. Complete your part of the YELLOW FORM (Report by Institution Student Will Attend) and send it to the Aid Officer at the school you plan to attend during the coming year. The YELLOW FORM must be received by the Chairperson **no later than June 30**, and it is your responsibility to insure that this deadline is met.
4. The Committee will notify you of its decision by **August 31**.

CONCLUSION

The Committee realizes that it requires much effort for students and parents to prepare the information necessary for consideration of an application. While we would very much like to have unlimited resources to allocate a maximum to each request, the best we can do is try to allocate the resources we have to those who have the greatest demonstrated need. Please keep this in mind when you are answering some of the difficult and personal questions on the WHITE FORM. Also, please remember that complete and neat forms submitted on time make our task easier.

Above all, we want you to know that each application which is received on time will get our close and serious consideration, and that all of your information will be seen only by the four members of the Committee and the volunteer Aid Advisor who assists us.

GOOD LUCK WITH YOUR APPLICATION!

WINCHESTER SCHOLARSHIP FOUNDATION (WSF) AID APPLICATION
WHITE FORM

RETURN BY: MAY 30 if you are a GRADUATING H.S. SENIOR
 JUNE 15 if you are now in

College (Please check which one applies.)

Mail or email completed forms to: Stephanie Altavilla, Chairperson, Winchester
Scholarship Committee, 6 Royalston Ave, Winchester, MA 01890
Please send regular mail only. Do NOT send registered mail.
Questions? Please email wsfoundchair@gmail.com

PLEASE PRINT OR TYPE

STUDENT'S SECTION

1. Name (last) _____ (first) _____ (MI) _____ Email: _____

Student's Address: _____

Tel # at which we can best reach you during June & July: _____

Parent's email: _____ Parent's tel #: _____

College: _____ Expected grad date (Mo/Yr) _____ / _____

High School: _____ HS Grad date (Mo/Yr) _____ / _____

If you are not living in Winchester, what was your Winchester affiliation? _____

Are you a U.S. Citizen? Yes - No (circle one). If no, what is your VISA status? _____

Important: See page 1 of Pink General Information form for eligibility for WSF awards.

2. Your future vocational plans? _____ Likely college major? _____

3. Name all non-college sources to which you have or will apply for aid (companies, foundations, VA, local awards, etc.; omit state and federal grants) and give range of possible awards and expected decision dates:

_____ (attach additional pages if needed)

4. Please describe (all applicants):

a) Principal school extra-curricular activities _____

b) Community activities _____

c) Talents and/or achievements, including the arts _____

d) Any other information which might be helpful to the Committee, including special problems you face at the moment:

_____ (attach letter if additional space needed).

IF NOW IN COLLEGE

5. Give this year's courses and grades: Cumulative GPA _____

<i>First Sem. Courses</i>	<i>Grades</i>	<i>Second Sem. Courses</i>	<i>Grades</i>
First Semester GPA:		Second Semester GPA:	

Important:

(1) You must request an official transcript from your Registrar to be returned directly to the Chairperson of the Winchester Scholarship Committee at the address listed at the top of this form.

(2) If your GPA is below 2.00 in any semester or cumulatively, you must attach a letter that will assist the Committee in justifying in any further awards.

6. If now in college, total amount you will have borrowed in your own name for education by May 2023? _____

What is the total borrowed for you by your family? _____

What is the total owed by family for siblings' education? _____

PARENTS' (FAMILY) SECTION

IF PARENTS ARE SEPARATED OR DIVORCED, QUESTIONS 11 THROUGH 16 SHOULD ALSO BE COMPLETED INDEPENDENTLY BY THE NONCUSTODIAL PARENT AND RETURNED WITH TAX FORMS DIRECTLY TO THE CHAIRPERSON AT THE ADDRESS LISTED AT THE TOP OF THIS FORM.

7. Name(s) of custodial parents/guardians _____
 Tel.# (_____) _____ Email _____
 Address _____ City/Town _____ Zip _____
 Occupation(s): 1) _____ 2) _____
 If guardian, please indicate legal relationship _____
 Will parent or guardian provide funds for the applicant's education? Yes - No (circle one). If No, please explain:

8. If parents are divorced or separated, please indicate the following as pertains to the noncustodial parent:
 Name _____
 Tel.# (_____) _____ Email _____
 Address _____ City/Town _____ Zip _____
 Noncustodial parent's occupation _____
 Will noncustodial parent provide funds for the applicant's education? Yes - No (circle one). If No, please explain:

NOTE: PARENTS ARE ASSURED THAT ALL INFORMATION, INCLUDING THE FOLLOWING, WILL BE HELD IN COMPLETE CONFIDENCE BY THE FOUR MEMBERS OF THE SCHOLARSHIP COMMITTEE AND THE AID ADVISOR.

9. Please fully complete the following table of financial information as indicated.

Year ending 12/31/21	Custodial Parents/Guardians		Noncustodial Parent
	1st earner:	2nd earner:	
Earned Income for Year	\$	\$	\$
Other Income for Year	\$	\$	\$
Assessed Value of Primary Residence	\$		\$
- Mortgage Balance	\$		\$
Monthly Rent or Mortgage Payment	\$		\$
Assessed Value of Second Home	\$		\$
- Mortgage Balance/Mo. Pmt.	\$ / \$		\$ / \$
Vehicles:	1st Vehicle	2nd Vehicle	
Make and Year			
Mileage			
Owned or Leased?			
Monthly Payments	\$	\$	\$
Value of Rental or Real Estate	\$		\$
- Rental Annual Income	\$		\$
Estimated Present Value of: Cash/Saving/Checking Accounts	\$		\$
Investments (Stocks, Bonds, Money Market & Mutual Funds)	\$		\$
Other Assets	\$		\$

10. During the *coming* school year, what children *other than the applicant* do you expect to support in college, technical school, or graduate school?

Name / Age	School	Tuition	Room / Board	Expected Aid	Your Contribution	
					This Year	Coming Year
/		\$	\$	\$	\$	\$
/		\$	\$	\$	\$	\$
/		\$	\$	\$	\$	\$

11. Name(s) and ages of other dependents not listed above: _____

12. If family income will be less this year, or if there are unusual circumstances not explained above or on the FAF, please explain here or attach additional sheets: _____

13. To be considered, this application must be accompanied by a photocopy of parents' and student's US Tax Return Forms and W-2 Forms. If this year's returns are not yet available, please include a copy of last year's returns and W-2 Forms as well as this Year's W-2 Forms. Please indicate below which photocopied documents are attached to this application:

✓	Year	Required Document or Form
<input type="checkbox"/>	2022	Custodial Parents' Form 1040 (complete with all Schedules as filed with IRS)
<input type="checkbox"/>	2022	Noncustodial Parents' Form 1040 (complete with all Schedules as filed with IRS)
<input type="checkbox"/>	2022	Supplemental information or comment sheets attached. Examples: Explanation if not all forms available; letter from student if cumulative GPA is below a C average (i.e., 2.00) to assist the Committee in justifying further awards.
<input type="checkbox"/>		Transcript from Registrar to WSF Chairman by June 30 (Students now in college only)

I certify that the information given in this application is complete and true to the best of my knowledge. I promise to notify the Winchester Scholarship Foundation promptly of any change in financial circumstances, of any change in school to be attended next year, or if more aid is received from any sources.

Date: _____

 Signature of Student

Date: _____

 Signature of Custodial Parent or Guardian

 Signature of Second
 Custodial Parent (if applicable)

Date: _____

 Signature of Noncustodial Parent (if applicable)

WINCHESTER SCHOLARSHIP FOUNDATION (WSF)
 REPORT BY INSTITUTION STUDENT WILL ATTEND
YELLOW FORM

INSTRUCTIONS

A. Parent/Student: Please complete section A of the form, below, as soon as possible and give to Aid Office of the institution you will attend next year. It is your responsibility to follow-up with the Aid Office and make sure the Winchester Scholarship Committee Chairperson has received a completed form *direct* from the institution prior to the deadline.

B. Aid Officer: Please complete section B (on the reverse side of form) and return to Chairperson of the Winchester Scholarship Committee prior to the deadline so that this student may be considered for a WSF Scholarship award. Time is of the essence. WSF grants are based on need and reasonable self- help, and range from \$500 to \$6,000 with an average award around \$3,000. If a grant is made, this student will bring a confirming notice to the Aid Office to obtain payment directly from WSF.

Return completed Form as soon as institution's aid decision is made to: Stephanie Altavilla, Winchester Scholarship Committee, 6 Royalston Ave, Winchester, MA 01890 or wsfoundchair@gmail.com **by regular mail or email only.**

DEADLINE FOR SUBMITTING THIS FORM: Winchester H.S. Seniors: **May 31**; Returning College Students: **July 15th**. Incomplete or late YELLOW FORM may result in denial of WSF grant. Please contact the Chairperson ASAP by email at wsfoundchair@gmail.com if there are unusual circumstances causing deadline to be missed. *Additional Request:* The Foundation asks that if a change is required in the institutional award as a result of a WSF grant, that loan/work be reduced first. **Any amount of WSF scholarship that would cause a reduction of gift aid already granted is to be returned to the Foundation.**

SECTION A -- PARENT/STUDENT IMPORTANT: Applicable Deadline (Circle One): **May 31** **July 15**

PRINT Student Name (Last) _____ (First) _____ (MI) _____

Social Security # xxxx - xx - _____ Home Address _____

Date: _____ City/Town _____ MA Zip _____

Student plans to live (Circle One): On Campus -- Near School Housing -- Commute from Parent's Home

Names and amounts of NON-INSTITUTIONAL scholarships already awarded to you:

<i>Type of Award</i>	<i>Amount of Award</i>

We give permission for the Financial Aid Office at _____ (institution's name) to release the family and financial information requested in Section B (on reverse side of this form) by the Winchester Scholarship Foundation (WSF) for the purpose of considering our request for financial aid.

Student Signature: _____ Parent/Legal Guardian Signature: _____

WINCHESTER SCHOLARSHIP FOUNDATION (WSF)
 REPORT BY INSTITUTION STUDENT WILL ATTEND
YELLOW FORM

SECTION B -- AID OFFICER -- ASSESSMENT OF UNMET NEED(for instructions: see reverse side)

Name of Institution: _____

Student Name: _____ Social Security #: xxx -- xx -- _____

1. Did both parents complete FAF (or similar form)? _____ If not, which? _____

2. 2023/2024 Tuition, Fees, Expenses:

Tuition _____

Fees _____

Room and Board _____

Transportation _____

Personal Expenses _____

Books and Supplies _____

Other (explain) _____ attach page for explanation, if needed

TOTAL COST: _____

3. Estimated Family Contribution:

Parent _____

Student _____

TOTAL FAMILY CONTRIBUTION: _____

ESTIMATED FINANCIAL NEED: _____
 (Cost less Family Contribution)

4. Financial Aid Awarded:

<u>Type of Award</u>	<u>Amount of Award</u>
Pell Grants	_____
State Grants	_____
Stafford Loan	_____
Perkins Loan	_____
Institution Scholarships & Grants	_____
Campus Employment Awarded	_____
Other Scholarships & Grants (Names) _____	_____
Other Loans (Names) _____	_____
Other Aid (Names & Types) _____	_____

TOTAL AID AWARDED: _____

REMAINING UNMET NEED: _____
 (Financial Need less Aid Awarded)

5. Maximum WSF Scholarship student may accept without change in Institutionally awarded scholarships(s) and grants(s) [or indicate "no limit"]: _____

Completed By (print) _____ Title _____ Date _____

Signature of Aid Officer _____ Tel. # (_____) _____ - _

Email: _____

Aid Officer: Please staple your business card to this form. Thank you.