



THE STEPHEN PHILLIPS MEMORIAL SCHOLARSHIP FUND
INSTRUCTIONS FOR RENEWAL APPLICATION
Applications Accepted
February 1st through April 1st (postmarked deadline)

2010
2011

- The **basic requirements** for a renewal scholarship to be considered:
 1. 2.5 GPA on a 4.0 scale is maintained
 2. Financial need has not decreased substantially
 3. All required information is submitted on time
- Per our IRS regulations, consideration and renewal of your award is not automatic or guaranteed, but depends on continued financial eligibility, acceptable academic performance, timeliness, and completeness of the application.
- In some cases, if your financial eligibility decreases, it may be necessary to reduce your award or disqualify you altogether. If there are special circumstances, they should be documented and explained on page 4 of the application. Also, please note that while the Phillips Scholarship attempts to reduce the financial burden for college students, it is expected that a certain amount of student and parent debt will be assumed and that students will be working as much as possible during the summer and school year. The information on pages 4 through 7 will help us determine financial need beyond the calculated eligibility figure. Zero or light loans and little work on the student's part may reduce what we consider to be that student's financial need.
- An EFC figure that you think is unreasonable for you and your parents to pay does not qualify as a special circumstance. It is determined by the Federal Government's standard calculations and is used to determine all students' financial aid packages. If you have questions about the validity or fairness of your EFC figure, you should contact your school's financial aid office for reconsideration of your aid package. They have more information and a greater capability to determine your current financial need.
- In signing page 3, you are giving permission for your counselor or director of financial aid to speak with us. This will enable us to better determine your financial circumstances and to make sure that our award money will not replace any aid, other than self-help, that you are receiving from your school.
- Before submitting your application, check our website's Current Phillips Scholars page to review renewal procedures and to make sure there are no changes or additional information recently posted for the 2010 Application.
- Keep these instructions and make a copy of your application and essays for your records. If an application is lost, you will have a copy to send in its place. The application is posted in PDF format on our website. All pages of the application may be filled out on your computer, and printed for submittal (See Instructions B, *Notes on completing the Application*). If you are unable to download the application, first make sure you have the latest version of Acrobat Adobe Reader, and then request one by mail or e-mail, and we will either mail you a hard copy or fill your request by way of an e-mail attachment. Submitting a neat, handwritten application is also acceptable.
- We will send you an e-mail confirming our receipt of your application and a letter in mid-June announcing your award. In submitting your application, please do not use FedEx, USPS Express or Certified mail, or any delivery mode that requires a signature on receipt. Please help us avoid long lines at the Post Office! You may use the U.S. Postal Service Delivery Confirmation. For a small fee, the Post Office's Delivery Confirmation Service will provide you with the date, zip code and the time your packet was delivered through their Track and Confirm Tool. Copy the following link for more information:
<http://www.usps.com/send/waystosendmail/extraservices/deliveryconfirmationservice.htm>
- Include all application materials in a **9"x12" or larger envelope** with a **postmarked date no later than APRIL 1st**.
- Any application that does not include **ALL** required information, on time, without viable reasons, will not be processed and a scholarship will not be re-awarded. Prepare **EARLY** so you will not be caught last minute without time to submit all of your information together. We will be processing close to 500 applications during February and March and appreciate your attention to all the details involved in submitting a complete application.
- If you have questions, please e-mail staff@spscholars.org. Include our response with your application as it is helpful to refresh our minds regarding any issues about which we have communicated.
- We look forward to hearing from you!

Send your application – no later than the postmarked date of April 1st to:
The Stephen Phillips Memorial Scholarship Fund
P.O. Box 870, Salem, MA 01970

A COMPLETE APPLICATION MUST INCLUDE:

Application

- Staple together pages 1-3. Page 2 lists two short essays which are to be answered in the space provided. You may type them on a separate page only if responses are limited to that one page with at least a 10 point font (if using a separate page, replace page 2 of the application with that page).
- Clip together pages 4-7 in order, followed by the remaining financial information.

Official Transcript

- Your cumulative GPA must be **2.5** or above to qualify for a renewal award. If your GPA is below 2.5, please submit your application with a transcript, explaining the reason for your grades and what you intend to do about them. Extenuating circumstances are considered and decisions will be made on a case-by-case basis upon receipt of your application. If you are denied a scholarship due to a low GPA, you may reapply the next academic year if your GPA is 2.5 or above.
- An official transcript **must** be included in your application packet and include fall 2009 grades. Order your transcript early enough so that you will have it to include with your application. An unofficial copy is acceptable if it is in a sealed registrar's envelope.

Financial Aid Award Letter

- This will be your **most recent** Financial Aid Award Letter for the **current year**. Resend the letter even if we already have it on file. Don't send your school's invoice. Make note on the letter of any changes you anticipate next year.
- Page 4 requests information regarding your current year loans and scholarships. Use your Financial Aid Award Letter to complete this portion. List all loan sources, both Federal and other, in the student loan section. Outside scholarships and grants not listed on your Award Letter should be listed on page 6 of the application and the award amounts should be added to your calculations on page 4 of the application, #2, Grants/Scholarships.

Student Aid Report (SAR) from FAFSA

- We strongly recommend that you file your FAFSA online, as it is the fastest and most accurate method. Remember you and a parent will both need to know the PIN numbers you used last year to complete the Renewal FAFSA.
- Submit a copy of your 2010-2011 Student Aid Report with your application, as the Federal Government does not send us your SAR, as it does to your school. See our website's Current Phillips Scholar page to view links to our current requirements for the format and pages of the SAR you should include, along with an actual SAR sample. Any SAR format should include the EFC, summary information and loan information.
- It is expected your SAR will accompany your renewal application. Not having your taxes done is not an acceptable reason for late filing, as FAFSA applications may be completed with estimated 2008 figures.
- Because we require the SAR early, ask your parents to file the FAFSA **early and carefully**. Late filing and mistakes, which require time-consuming corrections, may cause you to lose your scholarship.

Copy of the Student's 2009 W-2 Tax Form/s – earnings should correspond with Employment for 2009 on page 6. If you do not have W-2 form/s, explain, on the bottom of page 6 or on an attached sheet, why you didn't work or why the forms are not available to submit with your application.

IMPORTANT SECURITY INSTRUCTIONS: In order to assure the safety and privacy of personal information for you and your parents, we request that you black out all 9 digit social security numbers that appear on your application materials (W-2s and SAR).

Notes on Completing the Application: You may choose to complete the application on your computer, or you may choose to download, print and **complete it by hand**. If you choose to complete it on the computer, please note the following:

1. With a multiple-line answer, tab to the next line instead of hitting "enter."
2. The application has been enabled so that you should be able to save it as you work. For best results, you should be sure to download the latest **free version of Adobe Acrobat Reader**. It is also advisable to print each page as you complete it in case the program malfunctions and doesn't save your work. When printing each page, choose "Print Current Page" as opposed to "Print Current View" as Current View will return only a partial page.

Transfer Students

- If you plan on transferring, we must have an award letter from your new school by June 1st, which is shortly before the Trustees vote on all awards. If you are unable to make that deadline, you will not receive an award for that year, but you may reapply by completing a renewal application the next year. Please let us know if you have submitted a renewal application but find you cannot obtain your award letter by the June 1st deadline.
- **Study Abroad or at a Different School**– if you are planning on studying away from your home college or university in 2010-2011, please refer to our website's FAQs, which will explain our policy in this situation.



**THE STEPHEN PHILLIPS MEMORIAL
SCHOLARSHIP FUND
RENEWAL APPLICATION
2010 - 2011**

OFFICE	USE
<input type="checkbox"/> Transcript	<input type="checkbox"/> SAR
<input type="checkbox"/> Award L	<input type="checkbox"/> W-2 Forms
<input type="checkbox"/> EM M _____	
<input type="checkbox"/> EM C _____	

PERSONAL INFORMATION

Name: _____ SS#: XXX-XX-
Last First Miss/Mrs./Ms./Mr. Last four digits

Home Address: _____
Street City/Town State Zip

Cell Phone #: _____ E-Mail Address: _____
Home phone if no cell Print clearly to distinguish letters/numbers and hyphen(-) or underline(_)

Parents' Marital Status: Married Separated Divorced Mother is remarried Father is remarried

If parents are separated/divorced, check your primary residence: with mother with father equally shared with mother and father

Father's Name: _____ Living? _____ Highest Education Completed
 HS College Grad School
Mother's Name: _____ Living? _____ Highest Education Completed
 HS College Grad School

Father's Place of Work: _____ Occupation: _____
Mother's Place of Work: _____ Occupation: _____

INSTITUTION AND ACADEMIC INFORMATION

School you *attend*: _____

Transferring Information: If you will be transferring, check the box and complete the information below.

School you *will be attending*: _____
Bursar's address: _____

Are you a full time student (12 hours or more)? _____

Major: _____ For what degree: _____

College Year of graduation: _____
(mm/yyyy)

Phillips Year of Graduation _____

Note: Phillips awards are for no more than 4 undergraduate years.
Calculate your YOG with us 4 years from receiving your initial award.

GPA: _____ My cumulative GPA is below 2.5. I have attached an explanation for my grades and understand that students with GPAs below the requirement will be considered for a scholarship only on a case-by-case basis.

COMMUNITY SERVICE –In the past year what activity have you participated in at school or at home which involved a significant time commitment and which was of value to your school or community.

Activities	Total # Days Involved

ESSAYS

Please answer the short questions in the spaces below. You may use this sheet, which allows you to generate your answer by computer in the space provided, or you may supply your own computer generated response to insert in place of this page of the application. Please keep each response to one half page with no smaller than a 10 point font.

A. Why did you choose the school you are attending? In what ways has it met, exceeded or not met your expectations?

B. We understand that time pressure is the universal stress factor in college. Aside from that, what other challenges have you faced this year, and how have you dealt with them.? (Please do not write about time management.)

CHECKLIST AND SIGNATURE

Before being considered for a renewal award, you must:

- Check one box for each number (1-8)
- Include all required materials with this application

DEADLINE – BY THE POSTMARKED DATE OF APRIL 1st

SEND TO: Stephen Phillips Memorial Scholarship, P.O. Box 870, Salem, MA 01970

Mail this application and the following supporting materials in a 9x12” or larger envelope:

- Pages 1-3 of the Renewal Application** – computer generated or printed neatly and stapled together. Page 1 is personal information, page 2 includes two short essays, and page 3 is the checklist and signature page.
- Official transcript** with 1st semester 2009 fall grades, in a sealed envelope. An unofficial student copy is acceptable if it is in a sealed registrar’s envelope.
 I have enclosed my official transcript; however, my **Cumulative GPA is below 2.5**. I have enclosed an explanation for my GPA, which has fallen below 2.5 to include what I intend to do to raise my grades next semester.
- Pages 4 - 7 of the Renewal Application** – Phillips eligibility is greater than \$5,000. Clip supporting financial documents to these pages in the order listed below.
 Pages 4 – 7 of the Renewal Application – Phillips eligibility is less than \$5,000 and I may not qualify. To be considered for a renewal award, explain and document any special circumstances.
Required Supporting Financial Documents – to be clipped to pages 4-7 of the application
- Cost of Attendance Documentation** (attach to page 5) – if you have used 2A, 2B, 3A or 3B to calculate your cost of attendance on page 5 of the application, you **MUST supply documentation of those costs from a catalogue, your Financial Aid Award Letter or Internet page**, or your application will not be complete. Highlight the tuition, fees, and room and board figures you are using for your calculations.
 I have used the figures on your website for my cost of attendance (Choice #1 from page 5) and do not need to include documentation of my costs.
- Financial Aid Award Letter** – a copy of the most recent one you have. This will most likely be your 2009-2010 letter from last year since you will not have the 2010-2011 letter yet. You may use your online financial aid history if you don’t have a letter. Transfer students must have their letter from their new school by June 1st. You should notify us if you will not have the information by June 1st.
 I will not be receiving or have not been receiving any financial aid. Please attach a letter from your school with that information included, especially if you have been receiving aid in the past.
- Copy of 2010-2011 Student Aid Report**, all pages. See our website’s Current Phillips Scholars page for links to FAFSA information, the required pages and a sample SAR.
- Copy of 2009 Student’s W-2 Tax Form/s** and the IRS 1040 Tax form if available.
 I have not included my tax forms but have included an explanation as to why not.
- I have provided additional Financial Information on the top of page 4 to explain entries on my SAR or special financial circumstances for my family or me.
 On page 4, for #1, I have no entries on my SAR which require an explanation, nor do I have any special financial circumstances (questions #2).

I certify that all the statements made in this application form are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I have also read and noted all requirements listed on this application and its instruction sheet and understand that incomplete or late information will endanger the renewal of my award.

I also give The Stephen Phillips Memorial Scholarship permission to use my name, any photographs, and writings (with or without attribution) provided to the organization to be used in any of its publication material, reports, press releases, website, and activities associated with its scholarship program. I understand that all financial and academic information from my transcript and application is, and shall remain confidential.

I give my consent for my financial aid counselor or director and representatives of The Stephen Phillips Memorial Scholarship Fund to discuss my eligibility and need for scholarship assistance.

 Signature: _____ Date: _____

Print Name: _____ SS#: xxx-xx- _____

College: _____

FINANCIAL INFORMATION

1. From your 2010-2011 Student Aid Report, provide an explanation of the source for "a" and "b" below if applicable:

a. Entries of cash, savings and checking accounts greater than \$5,000 for student (line 41) and/or \$10,000 for parents (line 89):

Student (line 41): _____
 Parents (line 89): _____

b. Entries of Investments greater than \$5,000 for student (line 42) and /or \$10,000 for parents (line 90):

Student (line 42): _____
 Parents (line 90): _____

2. Describe any Special Financial Circumstances that apply to you or your family (attach an additional sheet if necessary):

While the Phillips Scholarship attempts to reduce the financial burden for college students, it is expected that a certain amount of student and parent debt will be assumed and that students will be working as much as possible during the summer and school year. The financial information requested will help us determine students' needs beyond the calculated eligibility figure. Zero or light loans and little work on a student's part may reduce what we consider to be that student's financial need and the amount awarded may be reduced from the previous year.

ELIGIBILITY Before reapplying for the Phillips Scholarship, you should determine if you qualify financially using the following calculations. Phillips Eligibility must be \$5,000 or greater.

EFC from SAR included in this application: \$ _____

* **Cost of Attendance** for 2010-2011 from page 5 worksheet (next page) \$ _____

I plan to live: on campus off campus (not home) commute from home

#1		
*Cost of Attendance	\$	
- EFC	\$	
= Eligibility	\$	

#2	Information from your award letter, but exclude Phillips	
Grants/Scholarships	\$	
Loans (student)	\$	
+ Work Study	\$	
= Total Aid	\$	

#3		
Eligibility (from #1)	\$	
- Total Aid (from #2)	\$	
= Unmet Need	\$	

#4		
Unmet Need (#3)	\$	
+Loans (from #2)	\$	
= Phillips Eligibility	\$	

WORKSHEET FOR CALCULATING & DETERMINING COST OF ATTENDANCE FOR 2010-2011

Check one below and continue to follow the directions for each choice

- 1. I am using your website's cost – go to Choice #1
- 2. I have this year's 2009-2010 cost for my school, used to determine 2010-2011 cost – go to Choice #2
- 3. I have next year's 2010-2011 cost for my school – go to Choice #3

NOTE: Choices #2 and #3 require documentation of costs from an official source (i.e. catalogue, school web site, award letter) with the tuition, room and board figures used for the calculations below circled or highlighted. If you are using Choices 2A, 2B, 3A or 3B, and you have no proof of your school's costs, your application will not be considered.

Choice #1

Cost from the Phillips Website Cost for #1 \$ _____

Choice #2 – (2009-2010 Costs)

- Tuition and Fees are listed separately in the costs – go to #2A
- Tuition and Fees are combined into one figure – go to #2B

Choice #2A

Tuition	
+ Room and Board	
= Total	
x 1.04 (or 4%)	
+ \$1,500 (fees)	\$1,500
= COST for #2A	

Cost for #2A \$ _____

Required documentation is attached

Choice #2B

Tuition & Fees	
+ Room & Board	
= Total	
x 1.04 (4%) = Cost for #2B	

Cost for #2B \$ _____

Required documentation is attached

Choice #3 (2010-2011 Costs)

- Tuition and Fees are listed separately in the costs – go to #3A
- Tuition and Fees are combined into one figure – go to #3B

Choice #3A

Tuition	
+ Room & Board	
= Total	
+ \$1,500	\$1,500
= Cost for #3A	

Cost for #3A \$ _____

Required documentation is attached

Choice #3B

Tuition & Fees	
+ Room & Board	
= Cost for #3B	

Cost for #3B \$ _____

Required documentation is attached

My College Billable Cost from Choice (check only one choice below): **Is** *\$ _____

- #1 #2A #2B #3A #3B

*Use this cost for your calculations on page 4 of your application

SIBLINGS IN COLLEGE

Including you, how many siblings will be studying full or half time at the undergraduate/graduate level?

<u>Sibling Name/s</u>	<u>Institution Attending</u> (indicate undergrad or graduate)	<u>Year of Graduation</u>

PARENT LOANS

List all cumulative loans that have been taken out in your **parents' names** for college expenses only for you or siblings.

<u>Loan Source</u> (Parent Loan, Credit Card, Equity Loan, etc.)	<u>For Whom</u> (you/siblings)	<u>Total Amount</u>
		\$
		\$
		\$
		\$

Total

STUDENT LOANS

List all cumulative loans that you have taken out in **your name**.

<u>Loan Source</u> (Government, Credit Card, etc.)	<u>Total Amount from this Source</u>
Federal Loans from SAR (<i>Financial Aid History Information</i>)	\$
	\$
	\$
	\$

Total

SCHOLARSHIPS AND GRANTS

List all scholarships and grants, excluding Phillips, you received in 2009-2010 which are not listed on your award letter and which you expect to receive in 2010-2011. Add these renewable award amounts to Grants/Scholarships total on page 4, #2.

<u>Source</u>	<u>Amount/Year</u>	<u>Renewable (yes/no)</u>
	\$	
	\$	
	\$	
	\$	
	\$	

EMPLOYMENT FOR 2009

List employment and 2009 earnings. 2009 earnings should correspond to figures listed on copies of your W-2 form/s.

<u>Employer</u>	<u>Dates Employed</u>	<u>Earnings</u>
		\$
		\$
		\$

If you did not work, please explain your reasons below.

FINANCIAL RESOURCES AVAILABLE FOR COLLEGE
WORKSHEET FOR THE 2009-2010 ACADEMIC YEAR

This worksheet will give us an idea as to what resources you have used to pay for this year's college tuition, room and board. These figures do not have to be exact; however, the total should come close to the 2009-2010 Cost of College.

Cost of College for 2009-2010 Academic Year: \$ _____

Parent Contribution \$ _____
 (How much your parents have paid for college this year)

Non-Custodial Parent Contribution (if applicable) \$ _____
 (How much your non-custodial parent contributed this year)

Student Contribution \$ _____
 (How much you have contributed from earnings, savings)

Parent Loans Parent Plus Loan \$ _____

Other – please list _____ \$ _____
 _____ \$ _____

Student Loans Federal (Stafford, Perkins) \$ _____

Other – please list _____ \$ _____
 _____ \$ _____

Scholarships/Grants – Total (include your Phillips award) \$ _____

Other Resources – Please list source (i.e. other family member)
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____

2009-2010 COST: _____ TOTAL \$ _____

If your total resources are less than the cost of attendance, please explain how you covered the difference between the cost and your total resources.