



## COLLEGE/HIGHER EDUCATION SCHOLARSHIP APPLICATION

### Deadlines and Instructions

Your application will be submitted to all OJCF scholarships for which you qualify.

The deadline for applications is **March 1**.

Applications must be postmarked by March 1 or they will not be considered. If March 1 falls on a Saturday or Sunday, the deadline will be the Monday immediately following. Letters of recommendation may be sent under separate cover or faxed; however, they also must be received by the May 1 deadline.

Please:

- Please, no double-sided copies.
- Do not staple documents.
- Applications **MUST** include federal tax information for the immediate preceding year or they will not be considered.
- Please include only the applicable federal tax form or income record - do not include schedules or W-2s.
- Do not include more than 2 letters of reference. Only 2 letters will be submitted to the committee.
- Do not enclose brochures, booklets, newsletters or other original program materials. One printed page of tuition information is sufficient.
- Do not include personal photographs. They will not be forwarded to the committee.
- Round dollar amounts to the nearest dollar.

You will need the following information to complete this application. Use this checklist to assist you in the application process:

- Federal tax return for the immediate preceding year for yourself and spouse if you are married, and for your parents if you are providing parent information;
- Records of untaxed income, such as Social Security benefits, welfare benefits, and veterans benefits, for yourself, and your parents if you are providing parent information;
- Tuition and fee schedule from the school or program you will be attending (a printout from the school or program web site is acceptable);
- Official transcript from last year of school completed;
- Two letters of reference, one coming from a Jewish communal professional or lay-leader;
- A signed statement from other financial contributors (such as family members) stating the amount of their support.

### Scholarship Cycle Timeline

The scholarship committee meets annually in mid-March to consider applications. The committee's recommendations for awards will then be presented to the OJCF Board of Trustees at the mid-June meeting for formal approval.

Once the OJCF Board of Trustees approves the scholarship committee's recommendations, written notice will be mailed to both those who have been chosen for awards and to those who have not been chosen. Checks are mailed directly to the educational institution on June 30.

### Residency Requirements

To qualify for this scholarship, you must be an Oregon resident. You may be considered an Oregon resident if:

- A. You have lived in Oregon for at least 12 months before registering for college.
- B. You moved to Oregon for reasons other than to attend school.
- C. You are financially independent and meet A and B above.
- D. You are a member of the armed services assigned to duty and living in Oregon.
- E. You are a member of a Native American tribe which had traditional and customary tribal boundaries that included parts of the state of Oregon or which had ceded or reserved lands within the state of Oregon.
- F. You have been approved for permanent residency in the U.S. and meet all other domicile and financial conditions.
- G. You are financially dependent up on an Oregon resident.
- H. An Oregon resident who has been living in Oregon for at least 12 months has claimed you as a dependent for tax purposes.

You are considered a nonresident if:

- A. You enrolled in a college or university more than eight hours per term within 12 months of moving to Oregon.
- B. Someone living in another state has claimed you as a dependent on state and/or federal tax returns.
- C. Your primary source of financial support comes from someone living outside Oregon.

#### Note:

If you or your family has unusual circumstances (such as a loss of employment), complete this application to the best of your ability and attach a one page explanation of your circumstances.

**SECTION 1 - STUDENT INFORMATION**

1. Are you a resident of Oregon as defined on Page 1?  Yes  No If you answered "No", STOP. You are not eligible for this scholarship.

2. Last Name  3. First Name

4. Street Address  5. Apt. #

6. City  7. State  8. Zip

9. Telephone Number  -  -  10. Email

**SECTION 2 - STUDENT STATUS**

11. Were you born before January 1, 1988?  Yes  No

12. As of today, are you married? (Answer "yes" if you are separated but not divorced)  Yes  No

13. Do you have children who receive more than half of their support from you?  Yes  No

14. Do you have dependents other than your children/spouse who live with you and receive more than half of their support from you, now and through June 30, 2013?  Yes  No

15. Are (a) both of your parents deceased, or (b) are you (or were you until age 18) a ward/dependent of the court?  Yes  No

16. At the beginning of the 2012-2013 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.?)  Yes  No

17. Are you a veteran of the US Armed Forces?  Yes  No

**SECTION 3 - ACADEMIC INFORMATION**

18. Name of school you will be attending

19. School Address

20. City  21. State  22. Zip

23. What degree or certificate will you be working on during 2012-2013?  Associates Degree  2nd Bachelor's Degree  Rabbinic Certification  1st Bachelor's Degree  Graduate or Professional Degree  Other (Please describe \_\_\_\_\_)

24. What is your intended Major/Course of study?

25. Name of last school you attended:

26. At the start of the 2012-2013 school year, what will be your student status?  Full Time  ¼ Time  Part Time  N/A

27. What will be your grade level when you begin the 2012-2013 school year?  1st year/never attended college  1st year/ attended college before  2nd year/sophomore  3rd year/ junior  4th year/senior  5th year/other undergraduate  1st year graduate/professional  continuing graduate/professional or beyond

28. What is your current GPA (If entering college as a freshman, give high school GPA. If entering as adult ed or special program, enter most recent GPA available)?

29. What is the annual base tuition for your major/course of study (not including room and board, books, travel expenses or lab and other fees)? \$

30. What are the estimated fees and taxes only for your major/course of study? \$

31. What is the estimated cost of your room and board only (if you program is a shorter term program and you will be staying in a hotel, include reasonable hotel cost – do not include travel)? \$

32. What is the estimated cost of your books? \$

33. What is the estimated cost of your lab materials (i.e., curriculum CDs, graphing calculators or tools, religious items required for study - do not include costs for personal computers or laptops)? \$

**STOP - Enclose a copy of your school's tuition and fee schedule (may be printed from school's web site)**

**STOP - Enclose your official transcript from the last year of school completed**

**SECTION 4 - PARENT FINANCES**

**STOP :**  
 If you (the student) answered "Yes" to any question in Section 2, skip this section and go to Section 5.  
 If you answered "No" to all of the questions in Section 2, you must complete this section even if you do not live with your parents. Refer to your parent's IRS tax return when necessary.

- "As of today" means the date you will submit this application.
- Grandparents, legal guardians, and foster parents are not considered parents for this section.
- If both your parents are living and married to each other, answer the questions about them.
- If your parent is widowed or single, answer the questions about that parent. If your widowed parent is remarried as of today, answer the questions about that parent and the person and the person to whom your parent is married (your step-parent).
- If your parents were divorced or separated, answer the questions about the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent. If this parent is remarried as of today, answer the questions about that parent and the person to whom your parent is married (your step-parent).

34. What is your Mother/Stepmother's name? I live with my mother

Last Name  First Name

35. What is your Father/Stepfather's name? I live with my father

Last Name  First Name

36. Parents' marital status as of today:  Married/Remarried  Single  Divorced/Separated (Year \_\_\_\_\_)  Widowed

37. Have your parents completed a 2011 income tax return?  Already Completed  Will file  Will not file

38. Which income tax return did your parents file or will they file for 2010?  IRS 1040  IRS 1040A, 1040EZ  Other

39. If "other", which return did/will they file?

For the following question, Include in your parents' household:

- Your parents and yourself, even if you don't live with your parents;
- Your parents' other children if (a) your parents will provide more than half of their support from July 1, 2011 through June 30, 2012, or (b) the children could answer "no" to every question in Section 2; and
- Other people if they now live with your parents, your parents provide more than half of their support, and your parents will continue to provide more than half of their support from July 1, 2011 through June 30, 2012.

40. How many people are in your parents' household?  41. How many people (including you) in your parent's household will be full-time college students between 7/1/2011 and 6/30/2012?  Part time?

42. Will either of your parents be full or part-time college students between 7/1/2011 and 6/30/2012?  Neither  Both  One

43. What is your parent's legal state of residence?  44. If your parents are Oregon residents, what month and year did they become residents?

45. What was your parents' combined adjusted gross income for 2011 as reported on their IRS tax return? \$

46. How much did your parents earn from working (wages, salary, tips, combat pay etc.) in 2011? (Answer this question whether or not your parents filed a tax return. This information may be on their W-2 forms, and/or on their 1099 forms)

Father/Stepfather	\$	<input type="text"/>
Mother/Stepmother	\$	<input type="text"/>

47. Child support, alimony, welfare benefits including TANF, social security benefits and any other non-taxable income received by your parents. \$

48. What are/will be the number of your parent's dependents for 2011 as reported on their IRS tax return?

49. Mother's/step-mother's occupation?  50. Father's/step-father's occupation?

51. As of today, what is your parents' total current balance in cash, savings, and checking accounts? \$

For the following questions investments include:

- Real estate (do not include the home your parents live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today.

Investments do **not** include:

- The home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) and prepaid tuition plans, or cash, savings and checking accounts already reported above.

52. Any other income including investment income, capital gains, IRA/401k distributions, rental real estate, royalties, partnerships, S corporations, trusts, etc., received by your parents.	\$	
53. As of today, what is the worth of your parents' investments, including real estate? (not their home) ( <i>Net worth means current value minus debt</i> )	\$	
54. As of today, what is the net worth of your parents' business and/or investment farms? (Do not include a farm that your parents live on and operate) ( <i>Net worth means current value minus debt</i> )	\$	
55. How much do your parents intend to contribute financially to your education in school year 2012-2013? (if your parents are allowing you to live and eat at home for free, write "R&B" next to any dollar amount)	\$	
56. How much in student loans do you and your parents intend take out for your education in 2012-2013?	\$	
57. Will anyone else besides yourself or your parents/step-parents (including gifts from grandparents, relatives, and friends but not including other scholarships or loans) be contributing financially to your education?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
58. If "yes", who?		59. How much? \$

**STOP - Enclose a copy of your parents' most recent tax return and records of untaxed income with this application**

**SECTION 5 - STUDENT FINANCES** If you (the student) answered "Yes" to any question in Section 2, fill out this section)

60. How many people are in your household? (if you filled out Section 3, use the same answers on this line)		61. How many people in your household (including you) will be full-time college students between 7/1/2012 and 6/30/2013?		Part time?	
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62. Have you (and your spouse if married) completed a 2011 IRS income tax return?  Already Completed  Will file  Will not file

63. Which income tax return did you file or will you (and your spouse) file for 2011?  IRS 1040  IRS 1040A, 1040EZ  Other

64. If "other", which return did/will you (and your spouse) file?

65. What is your (and your spouse's) combined adjusted gross income for 2011 reported on your IRS tax return? \$

66. How much did you (and your spouse) earn from working (wages, salary, tips, combat pay etc.) in 2011? (Answer this question whether or not you filed a tax return.) \$

67. Child support, alimony, welfare benefits including TANF, social security benefits and any other non-taxable income received by you and/or your spouse. \$

68. As of today, what is your (and your spouse's) total current balance in cash, savings, and checking accounts? \$

For the following questions investments include:

- Real estate (do not include the home your parents live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today.

Investments do **not** include:

- The home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) and prepaid tuition plans, or cash, savings and checking accounts already reported above.

69. Any other income including investment income, capital gains, IRA/401k distributions, rental real estate, royalties, partnerships, S corporations, trusts, etc., received by you and your spouse. \$

70. As of today, what is the worth of your (and your spouse's) investments, including real estate (not your home) (*Net worth means current value minus debt*) \$

71. As of today, what is the net worth of your (and your spouse's) business and/or investment farms? (Do not include a farm that you live on and operate) (*Net worth means current value minus debt*) \$

72. What are/will be the number of your (and your spouse's) dependents for 2011 as reported on your IRS tax return?

73. Your Occupation  74. Your Spouse's Occupation

75. Do you expect to take out any student loans for 2012-2013?  Yes  No

76. How much in student loans do you intent take out for your education in 2012-2013? \$

77. How much in cash do you (and your spouse) intend to contribute to your education in 2012-2013? \$

78. Will anyone else besides you (and your spouse) be contributing financially to your education? (including gifts from parents, step-parents, grandparents, relatives, and friends but not including other scholarships or loans)  Yes  No

79. If "yes", who?  80. Amount? \$

**STOP - Enclose a copy of your (and your spouse's if married) most recent tax return and records of untaxed income. Enclosed signed statement from other financial contributor(s) stating the amount of support if applicable.**

**SECTION 6 – OTHER SCHOLARSHIP INFORMATION PORTION**

81. If you have applied or will apply for any other scholarships for academic year 2011-2012, list them here:


82. If you have been awarded any other scholarships for academic year 2011-2012, list them with the amounts awarded here:


**SECTION 7 - ESSAY PORTION TO BE COMPLETED BY THE STUDENT ATTENDING THE PROGRAM ONLY.** Respond on a separate sheet. Please, no more than 1 page per essay.

83. What is your connection to Oregon's Jewish community?

84. What are your career goals?

**SECTION 8 - REFERENCES**

Submit two one-page letters of recommendation with one coming from a Jewish communal professional or current lay leader (i.e. Rabbi, teacher, staff, volunteer or board officer serving a Jewish charitable organization). Recommendation letters may be sent under separate cover but must be postmarked by the March 1 deadline.

85. Reference 1 

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 Relationship (teacher, etc.) 

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 Phone Number 

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86. Reference 2 

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 Relationship (teacher, etc.) 

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 Phone Number 

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**SECTION 9 - ENCLOSURE CHECKLIST**

87. Have you enclosed:

- Parents' tax return and records of untaxed income (if applicable)
- Student's tax return and records of untaxed income (if applicable)
- Signed statement from other financial contributors (if applicable)
- School's tuition and fee schedule
- Most recent official transcript
- Two one-page essays
- Two letters of recommendation (check here  if sent under separate cover)

**SECTION 10 - SIGNATURE AND CERTIFICATION**

I attest that all information submitted on this application form is true and accurate. I understand that with my signature below, I acknowledge that misrepresentation or omissions of material fact are grounds for disqualification.

88. Signature 

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 89. Date 

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This application must be postmarked by March 1st.

Mail applications to:  
Scholarship Committee  
Oregon Jewish Community Foundation  
610 SW Broadway, Suite 407  
Portland, OR 97205

If you have questions, please call 503-248-9328.

For Internal Use Only:  Kailes  Tarshis