



THE OREGON JEWISH COMMUNITY
FOUNDATION

THE KAILES FAMILY SCHOLARSHIP APPLICATION FOR COLLEGE TUITION

DEADLINES AND INSTRUCTIONS

The deadline for applications is May 1.

Applications must be postmarked by May 1 or they will not be considered. If May 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:

1. Please, no double-sided copies.
2. Do not staple documents.
3. Applications MUST include federal tax information for the immediate preceding year or they will not be considered.
4. Please include only the federal tax form and applicable schedules - do not include W-2s.
5. Do not include more than 2 letters of reference. Only 2 letters will be submitted to the committee.
6. Do not enclose brochures, booklets, newsletters or other original program materials. One or two photocopied or printed pages of program information are sufficient.
7. Do not include personal photographs. They will not be forwarded to the committee.
8. 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 returns 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);
- A signed statement from other financial contributors (such as family members) stating the amount of their support;
- Official transcript from last year of school completed;
- Two letters of reference, one coming from a Jewish communal professional or lay-leader.

SCHOLARSHIP CYCLE TIMELINE

The scholarship committee meets annually in mid-May 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 moved to Oregon for reasons other than to attend school.
- B. You have lived in Oregon for at least 12 months before registering for college.
- 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 may be 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 3 - PARENT FINANCES *(continued)*

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.

34. Any other income including investment income, capital gains, IRA/401k distributions, rental real estate, royalties, partnerships, S corporations, trusts, etc., received by your parents.	\$	<input style="width: 95%;" type="text"/>
35. 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>)	\$	<input style="width: 95%;" type="text"/>
36. 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>)	\$	<input style="width: 95%;" type="text"/>
38. What are/will be the number of your parent's dependents for 2009 as reported on their IRS tax return?		<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
39. What is your mother's/step-mother's occupation?	<input style="width: 240px; height: 30px;" type="text"/>	40. What is your father's/step-father's occupation?
<input style="width: 220px; height: 30px;" type="text"/>		

STOP - Enclose a copy of your parents' 2009 tax return and records of untaxed income with this application

41. How much do your parents intend to contribute financially to your education in school year 2009-2010? (if your parents are allowing you to live and eat at home for free, write "R&B" next to any dollar amount)	\$	<input style="width: 95%;" type="text"/>
42. Will anyone else besides yourself or your parents/step-parents (including gifts from grand parents, relatives, and friends but not including other scholarships or loans) be contributing financially to your education?		<input type="checkbox"/> Yes <input type="checkbox"/> No
43. If "yes", who?	<input style="width: 420px; height: 30px;" type="text"/>	44. How much?
		\$ <input style="width: 160px; height: 30px;" type="text"/>

SECTION 4 - STUDENT FINANCES

45. How many people are in your household? (if you filled out Section 3, use the same answers on this line)	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>	46. How many people in your household (including you) will be full-time college students between 7/1/2010 and 6/30/2011?	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>	Part time?	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
47. Have you (and your spouse if married) completed a 2009 IRS income tax return or other income tax return?					
<input type="checkbox"/> Already Completed <input type="checkbox"/> Will file <input type="checkbox"/> Will not file					
48. Which income tax return did you file or will you (and your spouse) file for 2009? <input type="checkbox"/> IRS 1040 <input type="checkbox"/> IRS 1040A, 1040EZ <input type="checkbox"/> Other					
49. If "other", which return did/will you (and your spouse) file?					
<input style="width: 470px; height: 30px;" type="text"/>					
50. What was your (and your spouse's) adjusted gross income for 2009 as reported on your IRS tax return?					
\$ <input style="width: 160px; height: 30px;" type="text"/>					
51. How much did you (and your spouse) earn from working (wages, salary, tips, combat pay etc.) in 2009? (Answer this question whether or not you filed a tax return. This information may found be on your W-2 or other forms).					
\$ <input style="width: 160px; height: 30px;" type="text"/>					

SECTION 4 - STUDENT FINANCES *(continued)*

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

53. 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 you 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.

54. 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. \$

55. 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*) \$

56. 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*) \$

57. What are/will be the number of your (and your spouse's) dependents for 2009 as reported on your IRS tax return?

58. Your Occupation 59. Your Spouse's Occupation

STOP - Enclose a copy of your (and your spouse's if married) 2009 tax return and records of untaxed income. Enclosed signed statement from other financial contributor(s) stating the amount of support if applicable.

60. How much do you (and your spouse) intend to contribute financially to your education in 2009-2010? \$

61. Do you expect to take out any student loans for 2009-2010? Yes No

62. If you have applied or will apply for any other scholarships for academic year 2009-2010, list them here:

63. If you have been awarded any other scholarships for academic year 2009-2010, list them with the amounts awarded here:

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

65. If "yes", who? 66. Amount? \$

SECTION 6 - 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.

- 84. What is your connection to Oregon's Jewish community?
- 85. What are your career goals?

SECTION 7 - 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 May 1 deadline.

86. Reference 1		Relationship (teacher, etc.)		Phone Number	
87. Reference 2		Relationship (teacher, etc.)		Phone Number	

SECTION 8 - ENCLOSURE CHECKLIST

88. Have you enclosed:

- Student's tax returns and records of untaxed income
- Parents' tax returns 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 essays
- Two letters of recommendation (check here if sent under separate cover)

SECTION 9 - 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.

89. Signature		90. Date	
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This application must be postmarked by May 1st.

Mail applications to:
Kailes Family Scholarship Committee
Oregon Jewish Community Foundation
610 SW Broadway, Suite 407
Portland, OR 97205
If you have questions, please call 503-248-9328.