



# JAMES L. AND NELLIE M. WESTLAKE SCHOLARSHIP PROGRAM

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## THE PROGRAM

The James L. and Nellie M. Westlake Scholarship Foundation was established in 1981 pursuant to the provisions of the wills of James L. and Nellie M. Westlake for the purpose of assisting Missouri residents in pursuing a college education. Renewable scholarships are offered each year for full-time study at an accredited four-year institution of the student's choice.

This scholarship program is administered by Scholarship Management Services<sup>®</sup>, a division of Scholarship America<sup>®</sup>. Scholarship Management Services is the nation's largest designer and manager of scholarship and tuition reimbursement 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 to the James L. and Nellie M. Westlake Scholarship Program must -

- Be Missouri residents.
- Be graduating seniors at Missouri high schools who plan to enroll in full-time undergraduate study for the entire upcoming academic year at an accredited four-year college or university,

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Be students who have completed one or two full years at a Missouri community college with sufficient credits to transfer to an accredited four-year college or university at the sophomore or junior level, respectively.

- Demonstrate limited financial resources with a family adjusted gross income of \$50,000 or less and an expected family contribution toward college of \$7,000 or less, *and*
  - Have at least a cumulative GPA of 2.5 on a 4.0 scale except community college applicants with one year transferable credits must have 2.25 or higher on a 4.0 scale.
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## AWARDS

Scholarship awards will cover the cost of tuition, plus approximately \$2,000 additional to cover the cost of fees, books, and supplies. For freshmen, awards may be renewed for up to three additional years or until a bachelor's degree is earned, whichever occurs first. Awards for community college students transferring to a four-year college or university are renewable up to two years for students entering at the sophomore level, up to one year for students entering at the junior level or until a bachelor's degree is earned. Renewal is contingent upon full-time study, maintaining a cumulative GPA of 2.25 or higher on a 4.0 scale for college freshmen, and a cumulative GPA of 2.5 or higher on a 4.0 scale for college sophomores and juniors, and continuation of the program by the James L. and Nellie M. Westlake Scholarship Foundation.

Awards are for undergraduate study only.

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## APPLICATION

Interested students must complete the application and mail it along with a current, complete official transcript of grades to Scholarship Management Services postmarked no later than **February 1**. Online transcripts and grade reports are not acceptable.

Applicants are responsible for gathering and submitting all necessary information. Applications are evaluated on the information supplied; therefore, answer all questions as completely as possible. All information received is considered confidential and is reviewed only by Scholarship Management Services and the Westlake Scholarship Foundation Education Committee.

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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, and an outside appraisal. The student must demonstrate limited financial resources with a family adjusted gross income of \$50,000 or less and an expected family contribution of \$7,000 or less as calculated by Scholarship Management Services to be eligible to receive an award. Instructions for completing the Financial Data section of the application are included.

Applications are evaluated and finalists are selected by Scholarship Management Services. The Westlake Scholarship Foundation Education Committee will select recipients. All applicants agree to accept the decision of Scholarship Management Services and the Westlake Scholarship Foundation Education Committee as final.

Applicants will be notified by mid-April. Not all applicants to the program will be selected as recipients.

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## **PAYMENT OF SCHOLARSHIPS**

Scholarship Management Services processes scholarship payments on behalf of the James L. and Nellie M. Westlake Scholarship Foundation. Payments are made in equal installments on August 15 and December 30. 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 the James L. and Nellie M. Westlake Scholarship Foundation. They are, however, required to notify Scholarship Management Services of any changes in address, school enrollment, or other relevant information and to send a complete transcript when requested.

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## **REVISIONS**

The James L. and Nellie M. Westlake Scholarship Foundation reserves the right to review the conditions and procedures of this scholarship program and to make changes at any time including termination of the program.

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## **ADDITIONAL INFORMATION**

Questions regarding the scholarship program should be addressed to:

**James L. and Nellie M. Westlake Scholarship Program**  
Scholarship Management Services – Deidra Willson  
One Scholarship Way  
Saint Peter, MN 56082

Telephone: (507) 931-1682  
[dwillson@scholarshipamerica.org](mailto:dwillson@scholarshipamerica.org)

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## INSTRUCTIONS FOR COMPLETING THE FINANCIAL DATA SECTION OF THE APPLICATION

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The Financial Data section of the application should be completed by parents, guardians, **or** by the applicant if independent. Independent is defined as one who is **not** claimed as a dependent by the parent/guardian for tax purposes. Information should be from a completed tax return filed with the IRS.

1. **State of Residence** is the state where the parents and/or (independent) applicant 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 for both parents if applicant is a dependent student, or by the applicant if independent. If applying as a dependent student, 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 (or spouse if student is independent)
  - 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 incomeIndependent students should only report those individuals who are supported by 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 Management Services in writing.