

**LOAN APPLICATION PROCEDURES**  
**THE EVALEE C. SCHWARZ CHARITABLE TRUST FOR EDUCATION**

*The Evalee C. Schwarz Charitable Trust for Education was created under the Will of Evalee C. Schwarz to provide interest-free loans to undergraduate and graduate students who demonstrate exceptional academic performance and significant financial need. Loans are available both to current and incoming college students.*

**Students seeking to qualify for a loan from the Evalee C. Schwarz Charitable Trust for Education must:**

- 1) Be a U.S. citizen at the time of application. (Resident alien status will not suffice.)
- 2) Qualify for financial need in the form of government grants. **Applicants must have an Expected Family Contribution (EFC) of \$5,711 or less as it appears on their FAFSA Student Aid Report (SAR).**
- 3) Be enrolled in a school in the state in which the student resides.  
**\*\*Possible exceptions:**
  - a) Online learning programs that are based out of state
  - b) Programs attended by adult students who make a permanent move to another state and who are no longer dependents of their parents for income tax purposes
  - c) Students who commute to or attend an institution that is geographically close, but across state lines (e.g. states contiguous to Washington, D.C. might be considered to be suburbs of Washington, D.C). Merely attending a school in a neighboring state would not suffice.
  - d) Students who attend a program in a neighboring state that offers in state tuition rates for those students whose home state colleges or universities do not offer certain programs (e.g. certain medical, dental, and veterinary schools).
- 4) Demonstrate an outstanding combination of class rank and standardized test scores. Standardized test scores must be in the top 15% of nation-wide scores.  
**\*\*Possible exceptions:**
  - a) Junior college transfer students, with 45 credit hours or more, who are not required to take either the SAT or ACT test in order to be admitted to their undergraduate programs, provided they will be attending a four year college or university and have exceptionally high grades
  - b) Students attending graduate programs that do not require a standardized test for admission
  - c) Postgraduate students who are admitted to graduate programs without a standardized test because of exemplary performance at the undergraduate level
  - d) Students enrolled in the second phase of certain combined degree programs that do not require a standardized test before entering the advanced degree program (e.g. Presidential Scholars BS/MD programs that do not require the MCAT, certain BS/PharmD programs that do not require the PCAT, etc.).

5) Not be seeking a law degree

**\*\*Applicants asserting one of the exceptions must provide supporting documentation with their applications.**

**Application Checklist:**

- 1) Completed application (5 pages), typed or printed neatly
- 2) Copy of official picture I.D. (driver's license, passport, or state identification card)
- 3) Official transcripts
- 4) Copy of admissions test score (SAT, ACT, GRE, GMAT, MCAT, etc.)
- 5) Copy of document stating current school costs (tuition, room, board, fees)
- 6) Copy of complete Student Aid Report (SAR) – confirmation page with EFC will not suffice
- 7) 3 letters of recommendation, two for prior loan recipients, from educational references **written for the Trust, not for other persons or organizations. Entering undergraduate students must have written recommendations from three high school teachers or administrators. Upper level undergraduate and graduate students must have written recommendations from three college professors.**
- 8) Personal essay
- 9) Signed & Dated Checklist

**PRIOR LOAN RECIPIENTS NEED NOT PROVIDE A PHOTO ID OR STANDARDIZED TEST SCORES AND TRANSCRIPTS ALREADY ON FILE.**

**Please send the above items in one packet, to the extent possible, to:**

Evalee C. Schwarz Charitable Trust for Education  
c/o Private Foundation Services, Inc.  
4265 San Felipe, Suite 1100  
Houston, TX 77027-2913

**Dates and Deadlines:**

January 1, 2021 – April 9, 2021 Completed applications accepted.

April 9, 2021 Application postmark deadline.

June, 2021 – Loan Committee Meeting. Applicants will be notified shortly thereafter.

**2021-2022 LOAN APPLICATION**  
**THE EVALEE C. SCHWARZ CHARITABLE TRUST FOR EDUCATION**

**(Please type or print legibly)**

**Applicant Data:**

Applicant's Full Name: \_\_\_\_\_  
                                                    LAST                                                            FIRST                                                            MIDDLE

Birthdate (mm/dd/yy): \_\_\_\_\_

Permanent Address: \_\_\_\_\_  
                                                    STREET                                                            CITY                                                            STATE                                                            ZIP

Email Address: \_\_\_\_\_ Telephone Numbers: ( ) \_\_\_\_\_  
                                                    ( ) \_\_\_\_\_

**Residency Information:**

The ECSCTFE requires that loans be given only to students who attend school in the state in which the student has his or her residency.

Upon whom are you basing your claim of residency? (See categories below.)

{ } **SELF** If selected, applicant must be self-supporting and not be claimed as a dependent on his or her parent's or legal guardian's most recent US Income Tax Return.

If your claim of residency is based on SELF:

1. How long have you resided at your current address?

Years \_\_\_\_\_ Months \_\_\_\_\_

2. Previous state or country of residence:

\_\_\_\_\_

**(Continued Residency Information)**

3. Please provide former addresses for the past two years:

|    |        |      |       |     |         |
|----|--------|------|-------|-----|---------|
| 1. | Street | City | State | Zip | From/To |
| 2. | Street | City | State | Zip | From/To |
| 3. | Street | City | State | Zip | From/To |

{ } **PARENT**

or

{ } **COURT APPOINTED LEGAL GUARDIAN**

(If selected, a copy of the guardianship papers must accompany this application.)

**If your claim of residency is based on PARENT or COURT APPOINTED LEGAL GUARDIAN:**

1. Parent/Legal Guardian's Full Name:

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2. Relationship to Applicant:

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3. Permanent Address and length of residency:

|        |      |       |     |           |
|--------|------|-------|-----|-----------|
| Street | City | State | Zip | How Long? |
|--------|------|-------|-----|-----------|

4. Previous state or country of residence:

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5. Please provide former addresses for the past two years:

|    |        |      |       |     |         |
|----|--------|------|-------|-----|---------|
| 1. | Street | City | State | Zip | From/To |
| 2. | Street | City | State | Zip | From/To |
| 3. | Street | City | State | Zip | From/To |

**Educational Data:**

***University Information:***

Name of school you will attend in the fall:

\_\_\_\_\_

Location of school:

\_\_\_\_\_ City \_\_\_\_\_ State

Degree being pursued and anticipated date of graduation:

Degree: \_\_\_\_\_ Anticipated Graduation: \_\_\_\_\_

Will you be a full-time or part-time student? FULL-TIME  PART-TIME

***Please attach a copy of a current brochure or other official document from your selected school outlining the school's costs (tuition, books, room and board).***

***High School Information:***

Name of High School attended:

\_\_\_\_\_

Location of High School:

\_\_\_\_\_ City \_\_\_\_\_ State

Date of High School Graduation: \_\_\_\_\_ Class Rank \_\_\_\_\_

Number in Graduating Class \_\_\_\_\_ GPA: \_\_\_\_\_ GPA scale: \_\_\_\_\_  
(Max 4.0 or 5.0)

***Transcripts and Admissions Tests:***

***Please attach official transcripts and copies of official score reports for standardized test taken (SAT, ACT, GRE, GMAT, etc.). Graduate students need not provide high school transcripts. Students who are not required to take a standardized test per the Trust's Loan Application Procedures are exempt from this requirement provided they can document the reason for their exemption.***

**College/University Previously Attended Information:**

**College(s)/Universities attended (Undergraduate):**

\_\_\_\_\_  
Name Location Dates of Attendance

\_\_\_\_\_  
Degree(s) obtained, if any Degree Date

\_\_\_\_\_  
Name Location Dates of Attendance

\_\_\_\_\_  
Degree(s) obtained, if any Degree Date

**College(s)/Universities attended (Undergraduate): *Continued***

| Name                       | Location | Dates of Attendance |
|----------------------------|----------|---------------------|
| Degree(s) obtained, if any |          | Degree Date         |

**College(s)/Universities attended (Graduate):**

| Name                       | Location | Dates of Attendance |
|----------------------------|----------|---------------------|
| Degree(s) obtained, if any |          | Degree Date         |

| Name                       | Location | Dates of Attendance |
|----------------------------|----------|---------------------|
| Degree(s) obtained, if any |          | Degree Date         |

**Loan Qualification:**

*Please complete the FAFSA (Free Application for Federal Student Aid) – [www.fafsa.ed.gov](http://www.fafsa.ed.gov).*

*Attach a copy of your SAR (Student Aid Report). **This Report must list your EFC (Expected Family Contribution).***

**Loan Data:**

Loans range from \$5,000 to \$15,000 per year, with a lifetime cap of \$60,000 per student.

Loan amount requested \$\_\_\_\_\_

Have you ever applied to the ECSCTFE? YES  NO

If yes, please list the year(s) in which the application(s) was submitted: \_\_\_\_\_

Have you ever received a prior loan from the ECSCTFE? YES  NO

If yes, please state the date(s) and amount(s) granted: \_\_\_\_\_ \$ \_\_\_\_\_  
Loan Date Amount  
\_\_\_\_\_ \$ \_\_\_\_\_  
Loan Date Amount

**Educational References:**

List (3) three educational references (professors, counselors, academic advisors, etc.) and include a current letter of recommendation from each.

1. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

2. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

3. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

**Essay:**

*Applicants must submit an original essay, the purpose of which is to provide information about their background, accomplishments, personal and career goals, and other relevant information. Applicants should consider this essay as the equivalent to a personal interview. Statements must not exceed two pages in length.\* Please attach to this Application.*

*\*One page single spaced or two pages double spaced, one inch margins, 12 pt. font*

**STATEMENT OF VERIFICATION/RELEASE AUTHORIZATION**

I certify that the information I have provided is complete and correct to the best of my knowledge. I authorize Private Foundation Services, Inc. to verify the information I have provided.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## The Evalee C. Schwarz Charitable Trust for Education Application Checklist

- Completed Application (5 pages), typed or neatly printed
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- Official Transcripts
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- Copy of document stating current school costs
- Copy of complete Student Aid Report (SAR) – confirmation page with EFC will not suffice
- Three letters of recommendation, two for prior recipients, from educational references **written for the Trust, not for other persons or organizations.**
- Personal essay
- Signed and dated Application Checklist

How did you find out about the Evalee C. Schwarz Charitable Trust? \_\_\_\_\_

*Please include all items with your application before submitting. By signing and dating below, you are indicating that you have included all required items with the application, and that you have also read the Policies and Procedures.*

\_\_\_\_\_  
Applicant's Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

The Evalee C. Schwarz Charitable Trust for Education  
c/o Private Foundation Services, Inc.  
4265 San Felipe, Suite 1100  
Houston, TX 77027

<http://www.evaleeschwarztrust.org/>