

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 \$6,206.00 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.
****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. **Virtually all graduate students are considered to fall into this exception, and are not required to provide supporting documentation.**
 - 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 if such scores are mandatory for entrance into the student's chosen college and/or program. Documentation showing that standardized test scores are not required must be provided with the application materials. Applicants are welcome to submit standardized test scores if they feel their scores might provide helpful information for the loan committee.
- 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.), or documentation that a test was not required
- 5) Documentation of Cost of Attendance (COA)
- 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 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, 2023 – April 10, 2023 (postmark deadline).

June, 2023 – Loan Committee Meeting. Applicants will be notified shortly thereafter.

2023-2024 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:

2. Relationship to Applicant:

3. Permanent Address and length of residency:

Street	City	State	Zip	How Long?
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4. Previous state or country of residence:

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
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Degree(s) obtained, if any	Degree Date
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College(s)/Universities attended (Graduate):

Name	Location	Dates of Attendance
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Degree(s) obtained, if any	Degree Date
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Name	Location	Dates of Attendance
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Degree(s) obtained, if any	Degree Date
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Loan Qualification:

Please complete the FAFSA (Free Application for Federal Student Aid) – 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, or (2) for prior loan recipients (**as described on the application checklist on page 2 of the Loan Application Procedures**) 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

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- Documentation of Cost of Attendance (COA)
- 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 **(as described on the application checklist on page 2 of the Loan Application Procedures) 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/>