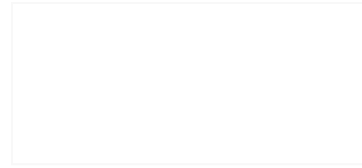


HUALALAI 'OHANA FOUNDATION



2018 Preschool Scholarship Application

Aloha Scholarship Applicant,

Mahalo for your interest in an educational award with the Hualalai 'Ohana Foundation.

The Hualalai 'Ohana Foundation provides prekindergarten scholarships to eligible children of Hualalai Community employees, which include Hualalai Investors, LLC, Four Seasons Hualalai and Hualalai Resort contractor employees.

2018 Application Policies:

For 2018, the Foundation has included the following preschools (all Hawaii Island locations are eligible). **Children must be three years old at time of application** to be eligible for the preschool scholarship.

Alaka'i Academy
Creative Day Preschool
Kamehameha Preschool
Montessori Preschool

Salvation Army Ohana Keiki Preschool
Small World Preschool
University of the Nations Preschool
Waikoloa Baptist Keikiland Preschool

Other licensed preschools will be considered by the Education Committee if a written request is submitted by Friday, March 16, 2018. Request forms are available online at www.hualalaiohanafoundation.org at our Programs page.

The Foundation conducts limited review of a certain number of preschools to determine whether they meet the basic criteria established by the Foundation for awarding scholarships to eligible children of the Hualalai Community attending the preschools. The review by the Foundation is not a comprehensive assessment or evaluation of the quality of a preschool or its suitability for attendance by any children of the Hualalai Community. By listing certain eligible preschools in the application package, the Foundation is not recommending or endorsing any of these preschools. The parents are expected to select the appropriate preschool for their children based on their own independent evaluation.

Award amounts, up to \$3,500, are determined by these criteria after all applications are received:

- Financial Need – based upon income, size of household and individual circumstances
- Tuition Cost – based on tuition cost for entire school year

If your child has received awards in past years, please apply again this year, as you may still be eligible. There is no limit to the number of awards per family within the scholarship category.

Application deadline for return of the completed application (attached) and all supporting materials is, Friday, April 27, 2018, for school year Fall 2018/Spring 2019.

There is no deadline for schools that allow year-round enrollment. Applications received after the April 27th deadline will be reviewed and amounts awarded based on available funds at that time. We recommend submission by the April 27th deadline to ensure maximum award.

Award notifications will be distributed the first week of June.

If you have any questions, please contact our office at 325-4701. We look forward to hearing from you.

Much aloha,

A handwritten signature in black ink that reads "Ed Mueller". The signature is written in a cursive style with a long, sweeping underline.

Ed Mueller, 2018 Board President

HUALALAI 'OHANA FOUNDATION

Preschool Award Guidelines and Eligibility

1. Student must be the legal child of an employee (Hualalai Resort, Four Seasons Hualalai or vendor of Hualalai Resort). Employees who are not parents of children they are applying for must provide documentation of legal guardianship. If the child does not reside with the employee, financial information for the custodial parent will be required.
2. The Hualalai community employee* must be employed with the resort at least one year as of the deadline, April 27, 2018, or date application received for year round schools.
3. Families earning a combined annual gross income** of \$195,000 or more are not eligible.
 - *Annual gross income* is defined as the total of all forms of gross income, prior to deductions, including pre-tax adjustments or deductions, contributions to retirement accounts or cafeteria plans, i.e., Social Security wages per W-2 form, and also includes any self-employment or rental property income
 - *All employees under the \$195,000 threshold are eligible to apply; however, in addition to income qualifications, all other aspects affecting each applicant's financial need will be considered before an award is granted*
4. To be eligible for **the Preschool scholarship award**, the applicant:
 - Must be enrolled or applying for enrollment in an accredited educational institution or program. Enrollment confirmation or tuition statement will be required.
 - Parents/Guardians must submit a personal letter outlining the **student's educational goals and/or special needs**, and a **description of financial need** to be eligible. The applicant will be responsible for any tuition expenses not covered by this award.
 - Must submit copies of **both** the 2017 W-2 forms and the completed and signed 2017 1040/1040EZ IRS Tax Return, instead of just one or the other. If either parent has additional forms of income, copies of associated schedules are required, such as; Self-Employment (Sched. C), Investment (Sched. D), Rental Income (Sched. E) and/or Farming (Sched. F).

Award Payments

Scholarship awards are paid only for tuition costs and official student fees. This award does not cover after-school care, extra-curricular activities, housing, supplies, or transportation costs.

If you receive an award, you must provide an invoice, tuition statement or receipt with proof of payment directly to the foundation. The tuition information provided in your application packet to the foundation is not acceptable for payment of your award. Award payments are made once per academic year, at the start of school.

DEFINITIONS

***Hualalai Community Employee** includes employees of Hualalai Investors, LLC or Four Seasons Hualalai; and any Hualalai Resort contractor, which means an employee or independent contractor of another company who provides services to the resort, hotel or resident homeowner for a minimum of 20 hours per week for over one year. Two (2) verification letters of eligibility – from your employer, hotel or resort verification or homeowner - must accompany your application.

****Annual gross income** is a total of all forms of gross income, prior to deductions, including pre-tax adjustments or deductions, contributions to retirement accounts or cafeteria plans, i.e., Social Security wages per W-2 form, and also includes any self-employment or rental property income

HUALALAI 'OHANA FOUNDATION

Is this your first time applying for this award?
YES NO

How did you hear about this award?

Program Fair Ambassador HR
Website Other: _____

Preschool Scholarship Application

(Please type or print clearly.)

Name of Student: _____ Birth Date: _____

Name of Hualalai Community Employee: _____ Date of Hire: _____

Mailing Address: _____

Home Phone: _____ Cell Phone: _____

E-Mail: _____

Are you on Facebook or Instagram? (Circle one) Yes No If Yes, Name _____

Your Relationship to student (parent, step-parent, guardian): _____

Student resides with: _____

Employer (circle one): Hualalai Investors LLC Four Seasons Resort Department: _____

Employed by a Resort Contractor? (If yes, which one): _____

Name of School: _____ Entering grade: _____

What is the annual cost of the program? _____

(*Please note the average award covers approximately 30% of eligible tuition costs, up to a maximum of \$3,500. Individual award amounts will vary depending on family size, tuition/income ratios, and total award budget for all applicants.)

Have you already applied to the school? (Circle one) Yes No (If yes, please include a copy of the acceptance letter)

Or, is student already enrolled in this school? (Circle one) Yes No

Is student currently enrolled in another school? (Circle one) Yes No

Which school? _____

Have you or do you intend to apply for financial aid with the school? (Circle one) Yes No

Please provide the following information for **two people we can contact for a reference**, if needed:

1. Name _____ Phone: _____

2. Name _____ Phone: _____

The Hualalai 'Ohana Foundation maintains the privacy and confidentiality of all applicants' personal and financial information.

P.O. Box 5227

Kailua-Kona, Hawaii 96745

(808) 325-4701 office

HUALALAI 'OHANA FOUNDATION

Confidential Personal & Financial Information

Name of Student: _____

Employee Provider (1)

Name _____

Relationship to Student: _____

of Other Children in Household: _____

Name and age of all children in household:

1) _____

2) _____

3) _____

4) _____

Additional Provider (2)

Name _____

Relationship to Student: _____

of Other Children in Household: _____

Name and age of all children in household:

1) _____

2) _____

3) _____

4) _____

Occupation _____

Employer _____

Home Phone _____

Work Phone _____

Cell Phone _____

E-mail _____

Total Income 2017 _____

Occupation _____

Employer _____

Home Phone _____

Work Phone _____

Cell Phone _____

E-mail _____

Total Income 2017 _____

TOTAL INCOME FOR 2017 (Providers 1 + 2) _____

Did one of the providers experience a lay-off or reduction of hours in 2017? If so, please describe: _____

Mortgage or Rent Payment (do not add utilities or insurance unless they are included) _____

For verification of income, please provide the 2017 W-2 forms AND the first two pages of the 2017 1040/1040EZ IRS Tax Return for all providers along with any Schedules for additional income. If the child does not reside with the employee, financial information for the custodial parent will be required.

The Hualalai 'Ohana Foundation maintains the privacy and confidentiality of all applicants' personal and financial information.

HUALALAI 'OHANA FOUNDATION

Preschool Scholarship Application Checklist

Please use the attached checklist to complete your application process.

Awards will remain pending until all items listed below are received by the foundation.

- Completed Scholarship Application Sheet *
- Confidential Personal & Financial Information Sheet *
- Copies of 2017 W-2s **and signed** 2017 1040/1040EZ Income Tax Returns (first two pages of tax return) *
 - Plus Schedule C, D, E or F, if applicable
 - Plus Custodial Parent's W-2 and tax return, if applicable
 - DO NOT submit Hawaii State Tax returns
- Personal Letter with description of: *
 - financial need, educational goals, special needs (if any), and
 - names of other scholarships/awards received
- Tuition Estimate, Invoice or original receipt of payment by applicant*
- Proof of enrollment, Acceptance Letter, or confirmation of application
 - Tuition invoice may be used as proof of enrollment
 - Proof of enrollment required prior to payment of award

***Indicates items that MUST be submitted by the deadline, April 27, 2018, or application will not be considered.**

To submit completed application packet, you may:

- Drop off in person to HOF office in mauka trailers
- Send by inter-office mail to Hualalai 'Ohana Foundation
- Drop off in person to your Human Resources department
- Mail to the address listed below
- **Faxed applications or documents will not be accepted.**