

# HUALALAI 'OHANA FOUNDATION



## 2020 Higher Education Scholarship Award

Aloha Scholarship Applicant,

Mahalo for your interest in a Higher Education award with the Hualalai 'Ohana Foundation.

The Hualalai 'Ohana Foundation provides Higher Education awards to high school seniors, returning adults and graduates working toward an accredited degree, who are eligible as, employees, spouses or children of Hualalai Community, which includes Hualalai Investors, LLC, Four Seasons Hualalai and Hualalai Resort contractor employees. This year, the Foundation will allocate approximately \$140,000 for educational scholarships for Higher Education awards.

### 2020 Application Policies:

Award amounts will be determined by these criteria after all applications are received:

- Financial Need – based upon income, size of household and individual circumstances
- Academic Merit – based upon GPA, academic achievement and community service
- Tuition Cost - based upon tuition cost for fall and spring semesters combined.

**The application deadline for traditional colleges will be Friday, May 15, 2020.** There is no deadline for online colleges that allow year-round enrollment, but early applications are encouraged before funds run out.

If you or 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.

Traditional college award recipients will be notified the week of June 12. Online college award notifications will be sent to awardees within 30 days of receipt of all necessary documents.

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, flowing style.

Ed Mueller, 2020 Board President

## Higher Education Award Guidelines and Eligibility

1. Applicant must be a Hualalai Resort employee\* (Hualalai Resort, Four Seasons Hualalai, or contractor of Hualalai Resort), the spouse or child(ren) of the employee. Children over the age of 18, must be a dependent of the employee, a fulltime student, and eligible up to the age of 24 years. Employees who are legal guardians 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 application deadline.
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 any deductions, including pre-tax adjustments, contributions to retirement accounts or cafeteria plans, and also includes any self-employment, unemployment or rental property income. Withdrawals from retirement accounts are not included.
  - *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 Higher Education award**, the applicant:
  - Must be a **high school senior or graduate, or re-entry student with a G.E.D.** The student must enroll at least part-time in an accredited college or university. Credit minimums are 6 credits per term for part-time and 12 credits per term for full time for undergraduate degrees (associate or bachelor). Graduate degrees are 3 credits per term for part-time and 6 credits per term for full-time. Proof of enrollment will be required.
  - Must **meet and maintain a minimum GPA (grade point average) requirement of 2.5** for each semester. Previous report cards or transcripts will be required.
  - Students must submit a personal letter outlining the **student's educational goals or special needs**, and a **description of financial need** to be eligible. The applicant will be responsible for any expenses not covered by this award.
  - Must submit copies of **both** the W-2 forms and the completed and signed 2019 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 (Schedule C), Investment (Schedule. D), Rental Income (Schedule E) and/or Farming (Schedule F).
  - Must complete a **FAFSA application and submit SAR Report** with application.

### Award Payments

Scholarship awards are paid only for tuition costs, official student fees and textbooks that correspond with each semester's official curriculum. This award does not cover extra-curricular activities, housing, supplies or transportation costs.

If you receive an award, you must provide a current 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 twice per academic year. To receive your second semester award payment, you will need to submit a copy of your second semester invoice and first semester grades showing a minimum 2.5 GPA.

If the employee ends employment within the Hualalai community during the 2020-2021 school year, this may affect payment of the second semester award.

### 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 provide services to the resort, hotel or resident homeowner for a minimum of 20 hours per week for over one year.

*Hualalai Resort contractors must provide two (2) verification letters of eligibility – from your employer, hotel or resort verification or homeowner – with their 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: \_\_\_\_\_

## Higher Education Scholarship Application

(Please type or print clearly.)

Name of Student: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Name of Hualalai Community Employee: \_\_\_\_\_ Hire Date \_\_\_\_\_

Employer (circle one): Hualalai Investors LLC    Four Seasons    Department \_\_\_\_\_    Resort Contractor \_\_\_\_\_

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

\*E-Mail: \_\_\_\_\_ \* Phone No: \_\_\_\_\_

Your Relationship to student (self, parent/guardian, spouse): \_\_\_\_\_

Student resides with: \_\_\_\_\_

If student does not reside with parent/guardian:

Student's Address: \_\_\_\_\_

\*Email Address: \_\_\_\_\_ \*Phone No.: \_\_\_\_\_

Name of trade school, college or university? \_\_\_\_\_

What is the annual cost of the program? \_\_\_\_\_

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

Have you been accepted to the school and are awaiting acceptance certification? (Circle one) Yes No

Or, is student already enrolled in this school? (Circle one) Yes No If yes, expected graduation date: \_\_\_\_\_

Will you be attending as a: (select one)

- Part-time student (minimum of 6 credits per term)
- Fulltime student (minimum of 12 credits per term)
- Part-time Graduate student (minimum 3 credits per term)
- Fulltime Graduate student (minimum 6 credits per term)

Will you be attending school as an online student? (Circle one) Yes No

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

Which school? \_\_\_\_\_ If yes, expected graduation date: \_\_\_\_\_

Will your student be (circle one) living on-campus? living off campus? living at home or with family?

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

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

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

***\* Parent and Student email addresses and phone numbers required for communication purposes.***

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

Please check one:

\_\_\_\_\_ Student is a dependent child under the age of 24 and single. Parental financial information for Mother and Father or Guardian(s) is provided below.

\_\_\_\_\_ Student is a Hualalai community employee, or the spouse of an employee older than 21 years. Financial information for student and spouse (if applicable) is provided below.

Name of Student: \_\_\_\_\_

### Primary Provider (1)

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 Gross Income 2019 \_\_\_\_\_

### 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 Gross Income 2019 \_\_\_\_\_

**TOTAL GROSS INCOME FOR 2019 (Providers 1 + 2)** \_\_\_\_\_

**Mortgage or Rent Payment** (do not add utilities or insurance unless they are included) \_\_\_\_\_

**For verification of income, please provide the W-2 forms AND the first two pages of the 2019 IRS 1040/1040EZ 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.**

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# HUALALAI 'OHANA FOUNDATION

## Higher Education Application Checklist

Please use the attached checklist to complete your application process.

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

- Completed Scholarship Application Sheet \*
- Confidential Personal & Financial Information Sheet \*
- Hualalai Resort Contractors only** –  
Two (2) letters verifying employment at Hualalai Resort
- Copies of 2019 W-2s **and signed** 2019 1040/1040EZ Income Tax Returns (first two pages of tax return only) \*
  - Plus Schedule C, D, E or F, if applicable
  - Plus Custodial Parent's W-2 and tax return, if applicable
  - Please DO NOT submit Hawaii State Tax returns
- SAR Report from free FAFSA application\*, [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
- Student's 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\*
  - Updated tuition invoice required prior to payment of award
- Proof of Grades (official transcript or report card) as of Fall Semester . \*
  - Final year official transcript is required to award application
- Proof of enrollment, Acceptance Letter, or confirmation of application
  - Tuition invoice may be used as proof of enrollment
- Information of other Financial Aid awarded or applied for\*

**\*Indicates items that MUST be submitted by the deadline, May 15, 2020 or application will not be considered.**

To submit completed application packet, you may:

- Drop off in person at 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 and documents will not be accepted**

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