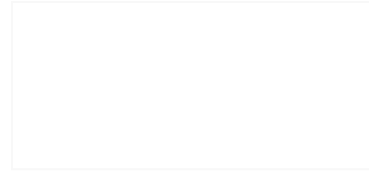


# HUALALAI 'OHANA FOUNDATION



## 2020 Kindergarten-Grade 12 Scholarship Application

Aloha Scholarship Applicant,

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

The Hualalai 'Ohana Foundation provides Kindergarten through Grade 12 (K-12) scholarships to eligible children of Hualalai Community employees, which include Hualalai Investors, LLC, Four Seasons Hualalai and Hualalai Resort contractor employees.

### 2020 Application Policies:

Award amounts, up to \$6,500, are 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 (middle and high school only), an outstanding GPA of 3.5 or higher may be awarded additional scholarship funds.
- 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.

**Deadline for return of the completed application (attached) and all supporting materials is, Friday, May 29, 2020.**

**If your child is accepted at an approved school after the deadline date of Friday, May 29, 2020, please contact our office for assistance.**

Award notifications will be distributed the end of June.

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

Much aloha,

Ed Mueller, 2020 Board President

# HUALALAI 'OHANA FOUNDATION

## Kindergarten – Grade 12 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, May 29, 2020.

*Employee's resignation from a position within the Hualalai community during the 2020-2021 school year will affect the status of the child's financial award.*

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 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 **Kindergarten-Grade 12 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.
  - Must **meet and maintain a minimum GPA (grade point average) requirement of 2.5 (C+)** for each semester for middle and high school only. Previous report cards or transcripts 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 2019 W-2 forms and the completed and signed 2019 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, official student fees and textbooks that correspond with each semester's official curriculum. 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. Awards are pro-rated monthly through the 2020-2021 school year. **If the employee ends employment within the Hualalai Community, any unused pro-rated funds will be returned to the Foundation.**

### 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. *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 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: \_\_\_\_\_

## Kindergarten – Grade 12 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, stepparent, guardian): \_\_\_\_\_

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

Employer (circle one): Hualalai Investors LLC    Four Seasons    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 \$6,500. Individual award amounts will vary depending on family size, academic merit, 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 or other sources?**

**(Circle one) Yes No Source(s) of financial aid**

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.

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

Occupation \_\_\_\_\_

Employer \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

E-mail \_\_\_\_\_

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

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

Did one of the providers experience a lay-off or reduction of hours in 2019? If so, please describe: \_\_\_\_\_

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

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

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# HUALALAI ‘OHANA FOUNDATION

## Kindergarten – Grade 12 Scholarship 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 \*
- Hualalai Resort contractors only** –  
Two(2) letter verifying employment at Hualalai Resort.
- Confidential Personal & Financial Information Sheet \*
- Copies of 2019 W-2s **and signed** 2019 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 Grades (official report card) as of 3<sup>rd</sup> quarter –  
for middle and high school, only \*
  - **Final year grades may be required prior to payment of award**
- 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**
- Information of other Financial Aid applied for\*

**\*Indicates items that MUST be submitted by the deadline, Friday, May 29, 2020, 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.**