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2010 INSTRUCTIONS

FOR COMPLETING THE U.F.T. COLLEGE SCHOLARSHIP FUND APPLICATION

INCOMPLETE APPLICATIONS WILL BE INELIGIBLE.

GENERAL INSTRUCTIONS

1. The deadline for schools to mail the application is **January 31, 2010**. Your high school may indicate an earlier date for submission of the application to them.
2. Applications which are incomplete at the time of selection may not be considered.
3. All supplementary documents must contain your name and high school.

The **Albert Shanker College Scholarship Fund of the United Federation of Teachers** award application includes questions which enable us to determine the eligibility of applicants. Some applicants have unusual home or family situations which cannot be completely described by answering only these questions. *If you have an unusual or extraordinary situation, it is your obligation to make it clear to the Selection Committee.* Your explanation of exceptional circumstances must be specific and include documentary proof (photocopies only) whenever it applies.

DOCUMENTARY PROOF, IN ADDITION TO THAT WHICH IS SPECIFICALLY REQUIRED ON THE APPLICATION, MAY INCLUDE SUCH ITEMS AS:

Adoption Papers	Guardianship Decrees
Alien Registration Card	Last Will and Testament
Bank Books	Letters on Official Letterheads
Birth Certificates	Naturalization Papers
Business or Corporate Tax Returns	Passports
Court Orders (ALL PAGES)	Property Tax Assessment and Mortgage Statements
Death Certificates	Separation Agreements (ALL PAGES)
Divorce Decrees (ALL PAGES)	Unemployment Form 1099-G
Deeds to Property	Visas

SPECIFIC INSTRUCTIONS

Some items are self-explanatory. Those which may require additional explanations are listed below.

ITEM NUMBER	EXPLANATION
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Front Cover	(Directions to Applicant)
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3	This direction suggests topics which you may use to try to convince the Selection Committee to select you as an award winner. You may select additional categories if you wish. Be brief but complete. Remember that you are competing for a \$5,000 award. <i>If you cannot submit good reasons why you should be selected as an award winner, the Selection Committee probably will not find reasons to select you.</i>
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Inside Cover-8	According to Federal Law, you must have a Social Security Number.
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9 & 10 & 11	If you attended any schools outside the New York City public school system, specify where, what school and include school records where available.
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FAMILY DATA

12 & 13	List basic information on the adult(s) presently responsible for you. If you are living with a relative other than your parent, explain the relationship. Also explain any unusual financial support arrangements. If your natural parent(s) is deceased, please supply the following information under item 27: Name of parent(s), occupation during the last full year of employment, date of death, tax return during the last full year of employment if within the last five (5) years. Also include a copy of the Last Will and Testament.
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12c & 13c	If unemployed at present, state duration of employment period and also include normal occupation. Explain in detail under item 27. Submit photocopies of the Unemployment Form 1099-G.
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12e & 13e	If parent is self-employed, nature and description of business should be included in item 27. If a separate business tax form is filed, a copy of that return, with all schedules should be included.
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14 & 14a	PARENTS' MARITAL STATUS: Please check box, insert dates and submit documents where applicable.
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15	MINORS —Brothers and sisters <i>not</i> living with you should be listed under item 27. Ex.: Away at college, living with relatives, etc. Step and foster brothers and sisters should be included here. If they are students, please give name or number of school. If employed, state occupation and employer.
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15a	List name(s) of sibling(s) who received UFT Scholarships in prior years. State the year they won.
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16	List any musical, artistic, or special talents you have.
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17	List your hobbies.
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Financial information

This category must include a complete tax return on which you are *declared as a dependent*. All information in this section refers to the 2008 calendar year. If parents are separated or divorced, *tax returns of both must be supplied*. All formal decrees, including property settlement, alimony, custody and child support copies must be submitted. *Be sure to submit photocopies of all tax returns filed, both front and back portions, and W-2 forms. Include 1099 forms. Include copies of all schedules cited on the tax return. For example, schedule B, C, D or E, etc..*

- 18 Give 2008 information. All 2008 information must be documented, and included with this application and include your name and social security number.
- 19 Compute annual amount in each category. Include dates where specified.
- 19a. Documentation required. Photocopy of I.D. card and *photocopy of family Budget Plan* can be obtained from your human resource office. On Budget Plan, please indicate approximate date of issuance.
- b. A statement of 2008 Social Security Benefits letter can be obtained by contacting your local Social Security Office. Please indicate effective dates of benefits.
- c. Proof of Veterans' Benefits are obtained from the Veterans Administration. The documents should show nature and amount of benefits. Please indicate effective dates and benefits.
- d. A photocopy of the current Unemployment Form 1099-G must be submitted.
- e. Court Order, Divorce Decree or other suitable documents. A copy of *both* parents' complete tax returns must be submitted. (Alimony is included as taxable income.)
- f. List here, and provide documentation, on proceeds of tax exempt securities, income from other countries, income from others who support the applicant, non-taxable pensions. Full statements of explanation should be added. Value of assets are to be listed under item 25.
20. This item refers to the house you live in. Any other property is listed under item 25. Explain partnerships or co-ownerships. If home, co-op, condominium or land, include a copy of the *annual* mortgage statement from the bank and a copy of your property tax assessment. This is the document used to prove taxes and interest paid when filing tax returns. You own the house even if it is not fully paid for.
- 22 Explain partnership or business car. If more than one car, explain under item 27.
- 24 Details and documents must be included. Send Schedule 'E' of your family's tax return.
- 25 Itemize, giving details and documents, all family assets not listed in 20 to 24. List stocks and bonds, money market funds, mutual funds, annuities and real estate. Send Schedule 'D.' Provide details of ownership, dates obtained, purpose of ownership. Give current fair market value. *This list must be attached to the application. Failure to list all assets will result in disqualification.* Explain under item 27 any arrangements whereby assets, income or dependencies are transferred or shared with family, friends or other associates. Describe any unusual or temporary financial arrangements.
- 26 **Both signatures are required.**
- 27 If born outside the United States, give *exact* date of arrival and detail circumstances and present status.

The deadline for mailing this application is *JANUARY 31, 2010*. Be sure that you turn it in to the school's guidance office far enough in advance of that date to insure that the school has time to complete its portion of your application. Many schools set their own earlier deadline. If you have difficulty obtaining any documentation by the deadline date, file the application without it. Attach a note explaining what items are missing and when you expect to have them in. *Then be sure to send them.* We will accept additional information until the selection process begins in February.

***NOTE: Remind your counselor to enclose your high school transcript.**

DETERMINING FINANCIAL ELIGIBILITY

To estimate your financial eligibility for this program, you must:

1. Ascertain the proper number of dependents to which your family is entitled. The number used for income tax purposes is the one you should use here, except that you *cannot* use the extra exemptions that IRS permits.
2. Add up all family income which will be included in lines 18 and 19 of the application. This is the non-taxable income of all family members, and taxable income of parents or guardians only.
3. Find the proper column for your family size in the table below, and compare the figure arrived at in 2 above with that in the table. If your family's income is equal to, or less than that shown, you are financially eligible based on income considerations.

DEPENDENTS	MAXIMUM FAMILY GROSS INCOME
1	\$24,490
2	\$28,750
3	\$32,450
4	\$34,950
5	\$37,350
6	\$39,750
7	\$42,150
8	\$44,550
9	\$46,950
10	\$49,350

This information is supplied for your estimate only. Other factors, such as family assets and resources and unusual circumstances, may eliminate some otherwise eligible applicants. Official eligibility will be determined by the Fund.

INCOMPLETE APPLICATIONS WILL BE INELIGIBLE.

A FINAL CAUTIONARY NOTE LOOK OVER YOUR APPLICATION:

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| 1. Have you completed all parts? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Have you submitted all required documents?
(Financial, transcript, references etc.) | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Have you taken care that all unusual situations are explained in detail, so that the Fund understands your personal and financial situation? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Are you eligible to apply for Federal Financial Aid (PELL)*? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

**IF THE ANSWER TO ANY OF THESE QUESTIONS IS "NO,"
YOU SHOULD NOT APPLY FOR THIS AWARD.**

*Applicants applying for this Scholarship must be eligible to apply for Federal Financial Aid (PELL) in order to receive this award. *We require a copy of ALL pages.*