



# COMMUNITY FOUNDATION OF THE LOWCOUNTRY, INC.

## **The Oak Advisors, LLC Scholarship of Excellence Program Scholarship Guidelines & Instructions for the 2012-13 Academic Year**

### **PURPOSE**

The *Oak Advisors, LLC Scholarship of Excellence Fund* was established at the Community Foundation in 2007 by the principals of Oak Advisors, LLC to provide annual post-secondary educational scholarships for students attending a high school located in Southern Beaufort County.

The purpose of The Oak Advisors LLC Scholarship of Excellence Program is to assist qualified students in pursuit of a post-secondary education who have shown outstanding academic and community achievements and plan to successfully complete a course of study in business or economics at an accredited college or university.

### **ELIGIBILITY/CRITERIA**

- A. Applicant must be a high school senior scheduled to graduate in the spring of the current school year from a high school on Hilton Head Island or Daufuskie Island or in Bluffton, SC.
- B. Applicant must be a U.S. citizen and legal resident of Beaufort County, South Carolina.
- C. Applicant must have a cumulative grade point average of at least 3.0 on a 4.0 scale.
- D. Applicant must have achieved and be able to show evidence of outstanding academic and community accomplishments.
- E. Applicant must have plans to successfully complete a course of study in Business or Economics at an accredited college or university.

### **APPLICATION PROCEDURE**

**Submit all application materials by Friday, March 23, 2012.** Application materials should include:

- A. A completed **Scholarship Application Form** excluding the Financial Need Summary information in Section #7 on page 4. The Scholarship Application form is available on the scholarship website ([www.lowcountryscholarshipdirectory.org](http://www.lowcountryscholarshipdirectory.org)) and at the Community Foundation of the Lowcountry office and high school guidance office.
- B. A *certified* copy of the applicant's most recent transcript(s) showing grades for at least the last two years.
- C. A typed essay (approximately 500 words) explaining why you have chosen to pursue Business or Economics as an educational and career field, and how your experiences and achievements have led you to this decision.
- D. **Three Recommendation Forms** to be completed by an employer, family member, current teacher, or school personnel explaining the applicant's ability to successfully complete a course of study at an accredited college or university.
- E. Each applicant must attend a personal interview with the Oak Advisors, LLC Scholarship of Excellence Advisory Committee (Scholarship Advisory Committee) if chosen as a finalist.

### **SELECTION OF RECIPIENTS**

- A. The Scholarship Advisory Committee shall select scholarship recipients (subject to approval by Community Foundation of the Lowcountry Board of Trustees).
- B. Scholarship funds will be awarded to cover educational costs, including but not limited to, tuition/fees, room and board, and books. Specific costs to be covered will be at the discretion of the Scholarship Advisory Committee.
- C. Scholarships are awarded without regard to race, sex, religion, age or national origin.

### **ANNOUNCEMENT OF SCHOLARSHIP AWARDS**

- A. The Community Foundation of the Lowcountry will send an official award letter and related information to each recipient.
- B. A public announcement of scholarship recipients will be arranged by the Community Foundation of the Lowcountry.
- C. Recipients may be further recognized through Awards Day programs at their schools.

### **DISTRIBUTION OF SCHOLARSHIP FUNDS**

- A. The Scholarship Advisory Committee or Community Foundation staff members will advise all scholarship recipients regarding how the scholarships will be paid and review the students' responsibilities to the Oak Advisors, LLC Scholarship of Excellence Program. These responsibilities include sending transcripts at end of the year, and providing notification of all address changes or changes in student status or enrollment.
- B. In accordance with the Community Foundation's policy, scholarship funds will be paid in the form of a check made payable to the college/school of the scholarship recipient. Checks will be mailed to the college/school on a pre-established dates (e.g. August 1). Notification of payments will be sent to scholarship recipients.

#### **Mail Application and Required Attachments by *Friday, March 23, 2012* to:**

**Community Foundation of the Lowcountry, Inc.  
4 Northridge Drive, Suite A  
Post Office Box 23019  
Hilton Head Island, SC 29925-3019  
Attn: Oak Advisors, LLC Scholarship of Excellence**

# Common Application Form for Oak Advisors LLC Scholarship

**PLEASE NOTE: This application is to be used ONLY if you are applying for one or more of the scholarships listed below:**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Gregory Fotia Memorial Scholarship                    | <input type="checkbox"/> Mina Larson and Mandas S. Mulrain Scholarship            | <input type="checkbox"/> Rotary Club of HHI/Kathleen H. Ruth Memorial Scholarship   |
| <input type="checkbox"/> Hilton Head Area Home Builders Association            | <input type="checkbox"/> <b><u>Oak Advisors LLC Scholarship of Excellence</u></b> | <input type="checkbox"/> Thomas Heyward, Jr. Scholarship                            |
| <input type="checkbox"/> Italian-American Club/Francis Mastridge Scholarship   | <input type="checkbox"/> Okatie Rotary Club Scholarship                           | <input type="checkbox"/> Women's Association of Hilton Head Community Service Award |
| <input type="checkbox"/> Military Officer's Association of America Scholarship | <input type="checkbox"/> Palmetto Quilt Guild Scholarship                         |   |
|  | <input type="checkbox"/> Pieter Smit Memorial Scholarship                         |   |

These scholarships are available to high school students and home-schooled students. This scholarship application form **must be submitted to each selected scholarship provider** or to your school's Guidance Office, **if** the school has agreed to receive applications for the scholarship provider. See General Instructions below for additional information about completing this application. You can find specific information about each scholarship at [www.lowcountryscholarshipdirectory.org](http://www.lowcountryscholarshipdirectory.org) or from your school's Guidance Office.

## General Instructions to Applicant

1. Make a copy of the blank application form and complete a draft copy first.
2. Return a typed or neatly printed application to the Community Foundation of the Lowcountry (see address on page 4) by the deadline date of **Friday, March 23, 2012**. This application is the first impression you will make upon those who award scholarships.
3. Check with your guidance counselor and/or the scholarship provider concerning additional requirements.  
**NOTE: The Oak Advisors Scholarship requires an essay, but no financial information.**

## 1. Personal Information

Full name of applicant \_\_\_\_\_ Nickname \_\_\_\_\_  
 Home telephone number \_\_\_\_\_ Email address \_\_\_\_\_  
 Present home address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Number of years lived in Beaufort County \_\_\_\_\_ Citizenship \_\_\_\_\_  
 Date of birth \_\_\_\_\_ Social Security Number \_\_\_\_\_

## 2. Family Information

Mother's name _____	Father's name _____
Occupation _____	Occupation _____
Street address _____	Street address _____
City,ST,Zip _____	City,ST,Zip _____
Phone number _____	Phone number _____

**Name and ages of siblings/other dependents. Indicate what school(s) they attend.**

Name	Relationship	Age	School or college/years attended
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### 3. Education

a. Name all secondary and/or technical schools you have attended in the last five years. List the school you are presently attending first.

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b. How many years do you plan to attend college, and what course of study would you like to pursue?

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c. What future business or educational career will you likely pursue after finishing college?

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d. What college(s) would you most like to attend? Please explain your reason.

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e. What colleges have you applied to for admission? Please indicate acceptance status.

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f. List scholarships, grants or loans for which you have applied, and check the ones you plan to use. Indicate funding amount you will receive.

Name	Amount	Plan to use
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### 4. Academic, athletic, service, and extra activities. Use additional pages or attach resume for sections 4a, 4b, and 4c.

a. List academic awards, achievements and dates.

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**b. List participation in athletic activities.**

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**c. List participation in community service and extra-curricular activities.**

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**5. Employment History**

List jobs you have held in the last three years.

**Employer                      Dates                      Hours per week                      Position                      Salary**

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**6. Your Expected Cost of College:**

Please provide the following information for each school that you apply.

	<i>College _____</i>	<i>College _____</i>	<i>College _____</i>	<i>College _____</i>
<i>Tuition</i>				
<i>Room/board</i>				
<i>Books/supplies</i>				
<i>Clothing/personal</i>				
<i>Entertainment</i>				
<i>Transportation</i>				
<i>Scholarship money available?</i>				
<b><i>Total Annual Cost</i></b>				

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**7. Financial Need Summary (NOTE: THIS SECTION IS NOT NEEDED FOR THE OAK ADVISORS, LLC SCHOLARSHIP OF EXCELLENCE)**

Complete this section regarding Estimated Combined Net Income of you, your parent(s) or guardian(s) for the current year. Please attach a copy of your and your parent's most recent Federal Income Tax statement to the back of this application form.

Name of person	Income and year	Total annual income
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b. Have you filed a FAFSA (Free Application for Federal Student Aid)? If so, please submit a returned copy showing your EFC (expected family contribution).

c. Describe any special circumstances such as medical conditions, disabilities, etc. that may affect your ability to pay for your college tuition. Use additional pages if necessary.

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**8. Transcript History**

This section is to be completed by your principal or guidance counselor. Attach a certified transcript of the student's high school record to this sheet.

Ranking in senior class: \_\_\_\_\_ of \_\_\_\_\_

GPA: \_\_\_\_\_ on a \_\_\_\_\_ scale

Best Combined SAT Score: Verbal \_\_\_\_\_ Math \_\_\_\_\_ Writing \_\_\_\_\_

Best ACT Score: Date \_\_\_\_\_ Score \_\_\_\_\_

Signature of principal or guidance counselor \_\_\_\_\_

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**I do state the above information is accurate to the best of my knowledge.**

Signature of Applicant \_\_\_\_\_

Date \_\_\_\_\_

NOTE: This scholarship application form **must be submitted by Friday, March 23, 2012 to:**

**Community Foundation of the Lowcountry  
Post Office Box 23019  
4 Northridge Drive Suite A  
Hilton Head Island, SC 29925  
ATTN: Oak Advisors Scholarship Advisory Committee**



COMMUNITY FOUNDATION OF THE LOWCOUNTRY, INC.

**The Oak Advisors, LLC Scholarship of Excellence Program  
Recommendation Form**

**PURPOSE**

The purpose of the Oak Advisors, LLC Scholarship of Excellence Program is to assist qualified students in pursuit of a post-secondary education who have shown outstanding academic and community achievements and plan to successfully complete a course of study in business or economics at an accredited college or university. Applicants must meet the following criteria in order to be eligible: have a cumulative grade point average of at least 3.0 on a 4.0 scale, and show evidence of outstanding academic and community accomplishments.

Your recommendation is needed as part of the application process. Please complete this form and return it by **Friday, March 23, 2012** to the Community Foundation of the Lowcountry, Inc. at the address listed below.

**To be Filled Out by Applicant**

Name of scholarship applicant: \_\_\_\_\_

Applicant's home address: \_\_\_\_\_

School applicant will attend this fall: \_\_\_\_\_

**To be Filled Out by Reference**

In what capacity have you known the applicant?

\_\_\_\_\_ Student    \_\_\_\_\_ Employee    \_\_\_\_\_ Other (specify) \_\_\_\_\_

Please attach a separate sheet to write a recommendation for the applicant listed above, keeping in mind the purpose of the scholarship program as mentioned above. **Please include your evaluation of the applicant's academic and leadership skills, community involvement, and why he/she should receive funding from this scholarship program.**

Signed \_\_\_\_\_

Title \_\_\_\_\_

Address \_\_\_\_\_

Daytime Phone \_\_\_\_\_

**Return this form by Friday, March 23, 2012 to:**

**Community Foundation of the Lowcountry  
4 Northridge Drive, Suite A  
Post Office Box 23019  
Hilton Head Island, SC 29925-3019  
ATTN: Oak Advisors, LLC Scholarship of Excellence**