



NAVY-MARINE CORPS RELIEF SOCIETY
USS TENNESSEE (SSBN 734) SCHOLARSHIP FUND
Instructions and Application Forms for
Academic Year August 2008 through May 2009

Deadline: March 1, 2008 (received by date)

The Navy-Marine Corps Relief Society (NMCRS or the Society) helps eligible Navy and Marine Corps families pursue their academic goals by providing education grants and interest-free loans.

The USS TENNESSEE Scholarship Fund provides financial assistance, in the form of a grant of up to \$2,000, for eligible full-time undergraduate students.

The deadline will not be waived or extended based on non-receipt of a new application form.

USS TENNESSEE Scholarships:

- **Can only be used in a traditional classroom setting** for: tuition, fees, books, supplies, room and board (on campus), and curriculum-required computers (a letter from the school required for the latter).
- No early disbursements will be made for purchase of books, etc.
- Disbursements will only be made to the educational institution.
- **Cannot be used for** correspondence courses, degree at a distance, Internet, or external degree programs.

The Society has been designated Fund Administrator. Award determination is based on financial need as determined by the documentation provided by the family.

ELIGIBILITY

1. All awards are based on financial need.
2. **A student must be the:**
 - **unmarried dependent child of a Sailor currently serving, or who has served, aboard the USS TENNESSEE.**
 - **unmarried dependent child of a retired Sailor who has served aboard the USS TENNESSEE.**
3. A student must possess a current military dependent's Uniformed Services University of the Health Sciences (USUHS) dependent's identification card.
4. A student must be a high school graduate (or equivalent) and enrolled or accepted as a full-time undergraduate student in a traditional classroom setting at a post-secondary, technical, or vocational institution participating in the U.S. Department of Education's Federal grant and loan at www.fafsa.ed.gov/fotw0809Ytdookup program.
5. A student must have a minimum cumulative grade point average (GPA) of 2.0 (on a scale of 4.0).
6. A student may receive assistance for no more than four academic years of undergraduate studies.
7. "Academic Year" means August through May only.
8. **Students applying for the USS TENNESSEE Program are also eligible to apply for the Vice Admiral E. P. Travers Loan Program. Please refer to the Travers Loan Request Form at www.nmcrs.org for more information.**

TERMS

- Applications must be received at NMCRS Headquarters no later than March 1, to be evaluated for the scholarship.
- Applications received by March 1, but incomplete for any reason will be returned as an incomplete submission.

- Applications received after March 1 may not be processed.
- No applications will be accepted for the current school year.
- A complete new application package is required for each academic year (August through May). Receipt of a scholarship for one year does not guarantee an award for future years.
- Awards are to be used in a traditional classroom setting for the following: tuition, fees, books, supplies, room and board on campus, and curriculum-required computers.
- Early disbursements are not authorized.
- Disbursements directly to the student, service member, or any third party are not authorized.
- By completing this form, the student makes application for a scholarship of up to \$2,000 for the academic year, which starts six to seven months after the March 1 deadline.
- All items on the forms must be completed in full or the application cannot be processed.

HOW TO APPLY

The application package consists of four forms: an Eligibility Application, Family Financial Data Form (FFDF), Untaxed Income Worksheet, and Grade Point Average (GPA) Verification Form. All three forms are required components of your application for this Program, and all requested information must be provided –**exception:** if the service member is retired, Section C of the Eligibility Application may be left blank. **I t i s t h e s t u d e n t ' s r e s p o n s i b i l i t y t o p r o v i d e** forms cannot be processed, and may result in the loss of award eligibility.

STEP 1. THE ELIGIBILITY APPLICATION FORM: Complete the form and attach **clear and readable copies** of the front and back of the following forms to the application:

- **E q r { " q h " v j g " h t q p v " c p f " d c e m " q h " v j g " u v w f g p v ø (If your 23rd birthday falls prior to August 15, you will not be eligible for this award; if your 23rd birthday falls after August 15, you will be eligible for an award for the full academic year.)**
- Copy of the front and back of the **servicemember's** **DD Form 1315** (Certificate of Eligibility) from the Personnel Support Detachment (PSD) or Administrative Office that certifies the child's
- If the service member is deployed and unable to sign provided a copy of a valid general Power of Attorney (POA) for the spouse is attached to the application.
- **If the service member is no longer serving on the USS TENNESSEE, a copy of the orders of assignment to or release from the USS TENNESSEE or a copy of his/her History of Assignments (NAVPERS 601-5) must be provided. In addition, a copy of the retirees Report of Discharge (DD 214) must also be provided.**

To Complete the Eligibility Application: Complete the application and attach copies of the documentation specified above to:

- Active Duty Personnel: Commanding Officer
USS TENNESSEE (SSBN 734)
FPO AA 34093-2117
- Retired Personnel do not forward the application via the Commanding Officer, but send directly to the Society (see Contact Information on page 5).

STEP 2. FAMILY FINANCIAL DATA FORM (FFDF): Do not submit this form to your college / university

The FFDF is a required component of your application. All requested information must be provided, as incomplete applications cannot be processed, and may result in delays and possibly result in the loss of award eligibility. While immediate return is recommended, all forms (including the Eligibility and GPA Forms) must be received no later than March 1st to be considered for an award.

General Student Information, Items 1-8:

General demographic information is to be completed by the student.

- Item 1: Make certain your Social Security number is correct as it identifies you to the Society, our Contractor (ACT), and the college / university's financial aid office.

- Item 5: In order to participate in this program, you must be classified as the dependent of an active duty or retired Navy service member (see Eligibility section, Item 2). Check the box of the parent or guardian who claims you as a dependent on their tax return, regardless of your current living arrangements.
- Item 8: Give the complete name and address (no abbreviations) of the college/university you will be attending beginning in August of the academic year which starts six to seven months after the March 1st deadline.

Student Income & Assets, Items 9-13:

These items refer to the income you earned during the most recent tax year. Use your W-2 form(s) and tax forms to complete this section. If you do not have finalized income or tax information available, you may use estimated information. **DO NOT** send your tax forms with the application unless the instructions specifically request them.

- Item 9: Write in the amount from Form 1040 –line 37, Form 1040A –line 21, or Form 1040EZ –line 4. If you will not file a tax return for the most recent tax year, use your W-2 form(s) to answer this item. If none, enter zero.
- Item 11: Write in the amount from Form 1040 –line 63, Form 1040A –line 37, or Form 1040EZ –line 10. If you will not file a tax return, enter zero. **DO NOT** copy the amount of “Federal income tax withheld.” For example, if your W-2 Form shows that \$2,000 was withheld, and you expect a refund of \$275, the actual tax you pay will be \$1,725.
- Item 13: Your cash, savings, and checking account balances are to be listed; other assets (stocks, bonds, investments) –any tax deferred retirement savings that would incur an IR

Your signature is required in item 24 on the back of the form.

General Parent Information, Items 14-17:

This section is to be completed by the parent/guardian who claims(ed) the student on their most recent tax return.

- Item 16: Including yourself and your spouse (if married), how many people are in your household? Include anyone who is receiving more than half of their support from you and your spouse (if married) during the academic year for which the student is applying. Include yourself, your spouse (if married), and dependent children under age 23. For example, a married couple with two children would enter a household size of four.
- Item 17: Write in the number of people from Item 16 who will be attending college at least half-time during the academic year for which your dependent is applying (example: August 1 through May 31). Always include the student who is applying for an award –but **do not include the parents**. Include other household members only if they are enrolling at least half time and are working towards a degree or certificate leading to a recognized educational credential.

Report Your Income, Items 18-23

These items refer to the income earned by the parent/guardian during the most recent tax year. Use your W-2 form(s) and tax forms to complete this section. If the parent has remarried, stepparent finances are to be reported. If you do not have finalized income or tax information available, you may use estimated information. **DO NOT** send your tax forms with the application.

- Item 18: Write in the amount from Form 1040 –line 37, Form 1040A –line 21, or Form 1040EZ –line 4. If you will not file a tax return for the most recent tax year, use your W-2 form(s) to answer this question.
- Item 21: Write in the amount from Form 1040 –line 63, Form 1040A –line 37, or Form 1040EZ –line 10. If you will not file a tax return for the most recent tax year, enter zero. **DO NOT** copy the amount of “Federal income tax withheld.” For example, if your W-2 Form shows that \$2,000 was withheld, and you expect a refund of \$275, the actual tax you pay will be \$1,725.
- Item 22: Write in the total amount of income or benefits not reported on your tax return, including untaxed child support, Social Security, Disability, or Temporary Assistance to Needy Families (TANF). **Active duty service members** must report the annual (not monthly) value of the housing allowance you would receive if you lived off base. To calculate this amount, go to <https://secureapp2.hqda.pentagon.mil/perdiem/bah/html> and enter the year as 2007, the ZIP code, and your rank. Click on Execute and the site will return the monthly amount; multiply this amount by 12 to get the annual figure. You may also call your local Finance Office to get this information. The annual value of these benefits can also be calculated from the member’s Leave and E-~~food~~ and other living allowances (BAH, BAS, etc.). In some cases the cash value of benefits will be the amount forfeited because the family occupied government housing. It is assumed that the service member has untaxed income and benefits to report. If you are claiming zero untaxed income, enclose a copy of your most recent LES as documentation. **Failure to report these benefits will delay the processing of the FFDF and may result in the rejection of your application.** See the Untaxed Income Worksheet (which follows the FFDF) for additional instructions on how to calculate this amount.

- Item 23: Your cash, savings, and checking account balances are to be listed; other assets (stocks, bonds, investments) –any tax deferred retirement savings that would incur an IR

The signature of the parent/guardian is required in item 24.

Special Circumstances: If there are special financial circumstances in the household that you wish to make known (such as death in the family, excessive unreimbursed medical or out-of-state fees, expenses etc., [such costs must be verified by the school] or unreimbursed expenses due to a natural disaster), you must include a letter of special circumstance along with substantiating documentation.

- You must enclose documentation for all circumstances –including out-of-state college fees.
- Retirement or other losses of income are not considered as special circumstances.
- Please attach your special circumstance letter to the FFDF.

Substantiating documentation (with the student), which provides the a l S e direct dollar impact on the income reported on the FFDF, must accompany your letter of explanation.

STEP 3. UNTAXED INCOME WORKSHEET: The worksheet is provided to assist you in putting together all of the financial information contained in your “Untaxed Income.”

STEP 4. GRADE POINT AVERAGE (GPA) VERIFICATION FORM: Verification of your GPA is a required component of your application for this Program. It is the s P A information. Please refer p o n s directly to the form for instructions. In lieu of a completed GPA Form, the Society college transcript (or high school transcript, if just graduating).

STEP 5. ASSEMBLING THE COMPLETED PACKAGE FOR MAILING: All of the required documentation must be attached. Review the forms to determine that all items have been answered correctly. Make copies of all completed forms and the attached documentation for your records as follows:

- Eligibility Application –Active Duty, make sure your Commanding Officer has signed Section C, and the required documentation is attached.
- FFDF –attach a letter of special circumstances, if any. No additional documentation is required, unless the line item instructions specifically request it.
- Untaxed Income Worksheet –attach as back up for entries on the FFDF.
- GPA Form –transcript OR a legible photocopy of the original transcript is acceptable in place of this form.

Mail the four original forms with required documentation to:

NMCRS, Education Division
875 North Randolph Street Suite 225
Arlington VA 22203

NOTIFICATION OF AWARDS

Notify NMCRS Headquarters Education Division immediately of any change of address!

Applicants who meet the March 1st deadline will be notified of their eligibility for a scholarship in mid-May. Award letters will be mailed by NMCRS Headquarters to the student.

If the student changes schools, he or she must inform the Society as soon as applicable. Upon receipt of the notification, the Society will recalculate the student’s financial need and change of schools can result in the loss of eligibility for a scholarship. In these cases, a second award letter will be issued.

DISBURSEMENT OF AWARDS

NMCRS disburses awards directly to the school payable to both the student and the school, and will be divided equally between the fall and winter semesters. The first half will be mailed no later than August 1st; the second half will be mailed no later than December 15th.

If the student will not be attending school during the spring semester, contact the school to ensure that any remaining balance is promptly returned to the Society. The student should also inform the Society

be made. The new calculation may result in loss of eligibility. Unused funds from the prior school must be returned to the Society before a new check is issued to a new school.

OTHER EDUCATION SOURCES

A list of other web source www.nmcrs.org/education ble on the Society's

CONTACT INFORMATION

If we can be of assistance, contact the NMCRS Education Division at:

Address: NMCRS Education Division
875 North Randolph Street Suite 225
Arlington, Virginia 22203

Phone: (703) 696-4960 or DSN 426-4960

Email: education@hq.nmcrs.org

Web site: www.nmcrs.org

Hours: 8:15AM - 4:15 PM, Eastern Time



USS TENNESSEE (SSBN 734) SCHOLARSHIP FUND
Eligibility Application for
Academic Year August 2008 through May 2009
Deadline: March 1, 2008 (received by date)

Please read the Instructions, Eligibility section before completing this form. Print legibly, using black ink.

A. STUDENT DATA: Complete items 1-13, then sign and date at item 14.

1. Eligibility: I am the unmarried, dependent child of an active duty retired Navy/Marine Corps service member of the:
 Blue or Gold Crew of the USS TENNESSEE.
 Currently serving Previously served from _____ to _____ (includes active and retired).
2. SSN: _____ 3. Name: _____
(last, first, middle initial)
4. Street Address: _____
 City, State, ZIP Code: _____
NOTIFY NMCRS OF ANY CHANGE OF ADDRESS.
5. Home Phone: ____-____-____ 6. Work Phone: ____-____-____ 7. Cell Phone: ____-____-____
8. Date of Birth (MM/DD/YYYY): _____ 9. Email Address: _____
10. Name of school I will be attending: _____
The school listed here should be the same as the one entered at item 8 of the FFDF)
11. Undergraduate level beginning in August of 2008: Freshman Sophomore Junior Senior
12. Major course of study (e n t e r e " d u " n d i e f c : l u a n r k n o w n) _____
13. Estimated college graduation date: _____ (enter month and year)
14. **Student Certification:** By my signature below, I certify that the above information is correct to the best of my knowledge. I understand that providing false or misleading information may result in the revocation of any award. I am also aware that the Society's assistance is need-based, and there is no guarantee of an award.
 Student Signature: _____ Print Name: _____ Date: _____

B. SERVICE MEMBER: Complete items 15-28, sign and date at item 29.

15. SSN: _____ 16. Name: _____
(last, first, middle initial)
17. Branch of Service: Navy Marine 18. Rank: _____ 19. Pay Grade: _____
20. Marital Status: Single Married Divorced Widowed
21. Active duty ID expiration date: _____ 22. Retirement date: _____
23. Address for receiving notification of award letters (mailed in mid-May): _____
24. Military or Work Address: _____
25. Home Phone: ____-____-____ 26. Work Phone: ____-____-____ 27. Cell Phone: ____-____-____
28. Email Address: _____

29. Service Member Certification: The student identified in Section A is my dependent child. The above information is complete and accurate to the best of my knowledge. I understand that falsification of information or failure to provide documentation may result in the revocation of any award. I am also aware that Society assistance is need-based, and there is no guarantee of award.

Signature: _____ Print Name: _____ Date: _____

C. CERTIFICATION BY COMMANDING OFFICER (not required if service member is retired)

30. I certify that _____ (SSN: ____-____-____) is currently on active duty and is serving has served aboard the USS TENNESSEE.

Signature: _____ Typed Name: _____

Rank/Title: _____ Phone: Commercial: (____) _____

Contact: _____ DSN: (____) _____ Date: _____



USS TENNESSEE (SSBN 734) SCHOLARSHIP FUND
Family Financial Data Form
For Academic Year August 2008 through May 2009
Deadline: March 1, 2008

PLEASE READ THE INSTRUCTIONS BEFORE COMPLETING THIS FORM. Print legibly, in ink.

A. GENERAL STUDENT INFORMATION:

1. SSN: _____ 2. Name: _____
(last, first, middle initial)

3. Street Address: _____
 City, State, ZIP Code: _____

4. Your state of legal residence (NOT your s c h o o l address)

5. With whom do you live? (Check one box.) The parent/guardian with whom you live must complete the parent section of this form. If you live by yourself, this does NOT mean you are independent under the guidelines of this program. **You must check the box of the parent/guardian who claims you as a dependent on their tax return.**

- | | | |
|--|---|---|
| (1) <input type="checkbox"/> Mother and Father | (4) <input type="checkbox"/> Mother and Stepfather | (7) <input type="checkbox"/> Parents Deceased |
| (2) <input type="checkbox"/> Mother only | (5) <input type="checkbox"/> Father and Stepmother | |
| (3) <input type="checkbox"/> Father only | (6) <input type="checkbox"/> Guardian (see statement in bold print above) | |

6. Are you, the student, married? No, I am not married. Yes, I am married (If married, you are no longer considered a dependent child, and therefore not eligible for the USS TENNESSEE Program.)

7. Are you, the student, a veteran of the U.S. Armed Forces? No, I am not. Yes, I am (if yes, you are no longer considered a dependent child, and therefore not eligible for this program).

8. Name and address of the postsecondary institution you plan to attend as an undergraduate student. This is the college, university, or vocational/technical school for which you seek this award. **DO NOT LEAVE THIS ITEM BLANK.**

School you are/will be attending: _____
 Name of Contact: _____ Phone Number: _____
 School Street Address: _____
 School City, State, ZIP code: _____

B. G H I 8 9 B H D G = B 7 C A 9 T S IN THE MOST RECENT TAX YEAR:

9. What was your Adjusted Gross Income for last year? (Form 1040 –line 37; Form 1040A –line 21; or Form 1040EZ –line 4). If a tax return will not be filed, use your W-2 Form to answer this question.
 If none, enter zero

10. How much did you earn from working (wages, salaries, tips, etc.)? Answer this question whether or not you filed a tax return. If none, enter zero

11. Enter the total income tax you paid in the most recent tax year (Form 1040 –63; Form 1040A –line 37, or Form 1040EZ –line 10). If a tax return will not be filed, enter zero. **Note: Tax withheld less expected tax refund = actual tax paid**

12. Enter your untaxed income and benefits (includes Social Security, TANF, and any other untaxed income). If none, enter zero

13. Student's cash, savings, and checking (do not include an for early withdrawal, such as IRA's and 401(k)'s. If none, enter zero

Student and Parent/Guardian signatures are required at Item 24 on next page.

To be completed by the parent/guardian who claims(ed) the student on a U.S. tax return.

C. GENERAL PARENT INFORMATION:

14. State of Legal Residence
15. Marital Status:
 (1) Yes, I am married (included remarried) (3) I am separated (use **only** your income)
 (2) No, I am NOT married (included divorced or widowed)
16. Including yourself and your spouse (if applicable), how many people are in your household? Include anyone who will receive more than half their support from you and your spouse during the academic year for which the student is applying (August –May)
17. Of those family members listed in Item 16, how many will be enrolled in college at least half-time during the academic year for which the student is applying

D. PARENT/GUARDIAN INCOME AND ASSETS IN THE MOST RECENT TAX YEAR:

18. Adjusted Gross Income (Form 1040 –line 37; Form 1040A –line 21; or Form 1040EZ –line 4). If a tax return will NOT be filed, use your W-2 Form(s) to answer this question. If none, enter zero.
19. Father / Stepfather earned from work (from your W-2 Form) including retirement income. If none, enter zero.
20. Mother / Stepmother's income (from your W-2 Form) including retirement income or work (from your W-2 Form). If none, enter zero.
21. Federal income tax paid in the most recent tax year (Form 1040 –line 63; Form 1040A –line 37; or Form 1040EZ –line 10). If a tax return will not be filed, enter zero. **Note: Tax withheld less expected refund = actual tax paid.**
22. Untaxed income and benefits (includes untaxed child support, Social Security, Disability, or Temporary Assistance to Needy Families [TANF]). Worksheet on next page.
Active duty service members: you must report the annual value of housing, food, and other living expenses (BAH, BAS, etc.) here, even if you occupy government quarters. **Failure to provide this information will delay the processing of this form and may result in the rejection of your application.** Read the FFDF instructions and the following page (Untaxed Income Worksheet) carefully for further information.
23. Cash, savings, and checking (do not include any tax deferred savings that would incur any penalty for early withdrawal, such as IRA's and 401(k)'s). If none,
24. In submitting this form, I certify that the information I have provided is complete and accurate to the best of my knowledge. I understand that reporting false information will result in the termination of any grant application or award. If asked by the Society, I agree to give proof of the information I have provided on this form.

Student signature (required): _____ **Print Name:** _____
 Date signed: _____

Parent/Guardian signature (required): _____ **Print Name:** _____
 Date signed: _____

Special Circumstances? (see instructions)

UNTAXED INCOME WORKSHEET
For Item 22 of Family Financial Data Form

Attach this form to the FFDF

For active duty service members occupying government quarters, untaxed income includes the annual (not monthly) value of the housing allowance you would receive if you lived off base. To calculate this amount, go to <https://secureapp2.hqda.pentagon.mil/perdiem/bah.html> and enter the year as 2006 or 2007, the ZIP code for your duty station, and your rank. Click on Execute and the site will return the monthly amount; multiply this amount by 12 to get the annual figure. You may also call your local Finance Office to get this information.

ITEM:	Monthly figure	Annual figure
a. Active Duty –Basic Allowance for Subsistence (BAS) from your LES or current pay tables.	_____ x 12 =	_____
b. Active Duty –Basic Allowance for Housing (BAH) from your LES. If you occupy government quarters, go to https://secureapp2.hqda.pentagon.mil/perdiem/bah.htm and enter the year as 2006, your duty station ZIP code, and your rank. Click on Execute to get the monthly rate.	_____ x 12 =	_____
c. Active Duty –members deployed to a tax-exempt area for any part of 2006 or 2007 must report base pay and additional allowances (hostile fire pay, etc.) as untaxed income. Check with your Finance Office if you need assistance in determining the amount.		_____
d. Active Duty –any other special allowances that are untaxed. Check with your Finance Office if you are not sure.		_____
e. Retired members –VA disability waiver (from 2006 or 2007 pay statement).		_____
f. Any other untaxed income such as Social Security Disability, Temporary Assistance to Needy Families (TANF), state disability, or other sources of untaxed income received by the student or parents as applicable.		_____
Annual Total (enter this amount in FFDF item 22)		\$ _____



USS TENNESSEE (SSBN 734) SCHOLARSHIP FUND
Grade Point Average (GPA) Verification Form
Deadline: March 1, 2008

INSTRUCTIONS:

Fill out Section A. Have your school fill out Section B, and return the form to you.

What school should fill out Section B?

- If you have no college credit, or if you have completed less than 12 hours of college-level coursework, have your high school guidance office complete the form.
- If you have completed at least 12 hours of college-level coursework, have your college

If you are not located near your school, or if your school cannot or will not complete the form, then leave Section B blank. In place of Section B, provide one or more of the following items to document your cumulative grade point average:

- High school seniors (and students who have completed less than 12 hours of college-level coursework): Provide a high school transcript that shows your cumulative GPA through your most recent grading period.
- College students: If you have completed at least 12 hours of college-level coursework, request a college transcript that reflects your cumulative GPA through your most recent grading period.

If a transcript is not available, provide a copy of a transcript that is accepted in place of a transcript.

Any grade documentation submitted must show the GPA (or average percentage score or letter grade).

Do not rely on the school to provide the information.

A. STUDENT:

1. SSN: _____ 2. Name: _____
(last, first, middle initial)

3. Student Authorization:

I authorize a representative from my current school to release information about my GPA and general academic progress.

Student Signature (required): _____ Date: _____

B. SCHOOL:

4. School Name: _____

School Address: _____

School City, State, ZIP Code: _____

5. Is the student making satisfactory progress? Yes No

19. Cumulative GPA (on a 4.0 scale): _____

20. Current year in school: Freshman Sophomore Junior Senior

21. Representative's Name: _____

22. Representative's Title: _____

10. Telephone Number: _____ Extension: _____

11. Email Address: _____

12. School Certification:

By signing this document, we certify that the grade information provided is accurate.

Representative's Signature (required): _____ Date: _____