

## J.D. Shatford Memorial Trust Advisory Committee

P.O. Box 192, Hubbards NS B0J 1T0

[shatfordtrust@gmail.com](mailto:shatfordtrust@gmail.com)

[www.jpmorgan.com/solutions/private-banking/foundations/shatford](http://www.jpmorgan.com/solutions/private-banking/foundations/shatford)

### Application Form for Educational Funding 2024/2025

Deadline for early applications is **July 15, 2024**

Name: \_\_\_\_\_ Social Insurance #: \_\_\_\_\_

Official Civic Address in Trust Area: \_\_\_\_\_

Parent's names: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name of Post-Secondary institution: \_\_\_\_\_ Student #: \_\_\_\_\_

School Registrar's Mailing Address: \_\_\_\_\_

Course: \_\_\_\_\_ Expected year of graduation: \_\_\_\_\_

*The following information must be included with your application:*

#### **1st time Applicants (see page 2 for scheduled meeting)**

- ☐ Proof of age (copy of driver's licence preferred)
- ☐ Letter of acceptance
- ☐ Copy of last school marks (Final High School Transcript)

#### **Following Years**

- ☐ Annual application required
- ☐ Copy of final marks since last application
- ☐ Letter of acceptance if for new institution

#### **All applicants:**

Number of credits or credit hours (excluding co-op terms) registered for: \_\_\_\_\_ (July 1 – June 30)

**Fully completed applications received by the Trust Advisory Committee up to July 15, 2024 will be processed on a priority basis to ensure that funds are received by the various institutions on a timely basis. Late applications will be accepted and processed as time permits.**

I have lived within the geographic boundaries of the Trust continuously since \_\_\_\_\_ including a minimum of my last 3 complete years of high school (Grades 10 to 12) and I understand that:

- a) Only applicants (defined Page 2) who reside in the Trust's geographic boundaries defined by the Surrogate's Court, County and State of New York (on March 25, 1957) are eligible for funding.
- b) The application for one year's funding will be reviewed and approved at the sole discretion of the, Trustee JPMorgan Chase Bank, N.A. who will then inform the above institution of any receipt of scholarship funds directly by mail.
- c) Annual applications are required.
- d) It is my responsibility to report any financial assistance from the Trust for income tax purposes to Canadian income tax authorities (CRA).
- e) The J.D. Shatford Memorial Trust and its representatives reserve the right to publish any and all names of applicants and scholarship recipients as they deem appropriate. I agree that this would include my name.
- f) Proof of residency may be requested.
- g) I authorize that the High School I attend can be contacted by Shatford Trust advisors to provide transcripts and proof of residency.
- h) I authorize my educational institution to provide transcripts and disclose my academic and financial information to JPMorgan Chase Bank, N.A., Trustee, as it pertains to this scholarship grant.
- i) Any false information is a cause for investigation.

\_\_\_\_\_  
(Student's signature)

\_\_\_\_\_  
(Date)

This area is for Trustee's use only. \_\_\_\_\_

**J.D. Shatford Memorial Trust Advisory Committee**  
**P.O. Box 192**  
**Hubbards, N.S. B0J 1T0**  
[shatfordtrust@gmail.com](mailto:shatfordtrust@gmail.com)  
[www.jpmorgan.com/solutions/private-banking/foundations/shatford](http://www.jpmorgan.com/solutions/private-banking/foundations/shatford)

**Please keep for information purposes – do not include with your application**

Annually the Trust Advisory Committee meets with first time applicants for an information session to assist with any questions with respect to the application process. As well, it is important that the Trust Advisory Committee gets to know applicants in case there are problems that need to be discussed during the year.

*The group meetings are scheduled to be held at the Aspotogan Heritage Trust (AHT) building in Hubbards,*

**Tuesday, May 14, 2024**

*Any student with a conflict should contact [shatfordtrust@gmail.com](mailto:shatfordtrust@gmail.com)*

**Meetings will be arranged as follows:**

**7:00PM** Dalhousie University students

**7:30PM** All other students

Forward your completed application to the address on the letterhead as quickly as possible following receipt of year-end school marks. (See Basic Guidelines #3 below). Forms for a new year are generally posted early in May on web-site.

We require that you provide the proper numbered street address to assist with the verification of the residency requirement. There is a map on the web-site above, at the J.D. Shatford Memorial Library and at the Aspotogan Heritage Trust Office that will help you if you have any concerns with respect to your residential eligibility.

**At this time all applicants should meet the following criteria:**

1. 25 years of age or less at time of first application. Significant timing of further application can cause eligibility complications.
2. Permanent residency (parent/parents **AND student**) within the Trust's geographic boundaries during the last three (3) years of high school (Grades 10 to 12) and continued family residency within the Trust's geographic boundaries following your high school graduation while receiving funding from the Trust. Proof of meeting permanent and primary residency requirements may be requested. Living with grandparents, relatives or other families does not qualify.
3. Proof of acceptance at an accredited university, community college or vocational-type institution.
4. Willingness to provide additional information as requested by the Trust Advisory Committee and Trustees.
5. Applicants for full time classroom study only to be considered.
6. Each application covers one year of funding only. **Annual applications are required.**

**Basic guidelines for funding and timing of funding:**

1. Annual funding amount will be determined based on the number of successful applicants and income of the Fund.
2. Students are eligible for funding up to 10 years. Funding at the undergraduate level is including any courses at the vocational school level will only be provided for up to 6 years with any additional funding based on graduate level programs.
3. Funding after year 1 will be based on passing marks received for the prior academic year ending June 30. Calculation can be found on the J.D. Shatford Trust web-site.
4. Co-op terms are not considered when funding determined.
5. **Fully completed applications received by the Trust Advisory Committee up to July 15, 2024 will be processed on a priority basis to ensure that funds are received by the various institutions on a timely basis. Late applications will be accepted and processed as time permits.**
6. For all scholarship recipients, funding will be paid directly to the institution.
7. The Trustee is JPMorgan Chase Bank, N.A., New York, New York. Final decisions regarding eligibility, amount of funding and timing of payment rests with the Trustee. The Trustee has sole discretion over applications. The terms and conditions upon which scholarship grants are made may change over time at the sole discretion of the Trustee.