

**THE JAMES AND PHYLLIS TRACY SCHOLARSHIP FOUNDATION
BANK OF AMERICA. N.A., TRUSTEE**

Due April 15, 2025

Purpose

The James and Phyllis Tracy Scholarship Foundation will award "... scholarships...assisting worthy and intelligent young people of said City of Waterbury in obtaining an education on levels more ...advanced than those under the public school system of said Town, including in the field of education not only academic studies, but also scientific, vocational, professional, and other miscellaneous studies..."

Eligibility

To be eligible to receive a scholarship, the applicant must satisfy all of the following criteria:

- The applicant must be a resident of the City of Waterbury for a minimum of five years. The Scholarship Selection Committee may require proof of legal residency and will reject applicants who cannot provide such proof.
- The applicant must possess financial need.
- The applicants must plan to attend a four-year degree-granting institution or vocational school. In addition, students presently enrolled in a four-year degree-granting program are eligible if they are planning to continue their undergraduate studies.
- The applicant must have demonstrated aptitude or achievement; such things as academic record and extracurricular activities such as sports are important.
- The applicant should have demonstrated outstanding citizenship such as having been active in community affairs.

An applicant may apply for a scholarship before being accepted into the college or university. However, awarding the scholarship is contingent upon being accepted into attending the school.

Application Procedure:

The applicant is required to submit a completed application form provided by The James and Phyllis Tracy Scholarship Committee. The application and all other required material must be emailed no later than **April 15th** of the year for which the applicant is seeking scholarship assistance. Faxes are not accepted. The following materials must be submitted:

- 1) An official transcript of the applicant's secondary school record, complete to the last full marking period. This record must be emailed to jean.m.harrison@bofa.com prior to April 15.
- 2) A letter of recommendation from a school counselor or a teacher must be emailed directly to jean.m.harrison@bofa.com. The letter of recommendation should cover character, attitude, academic standing, extracurricular activities, including sports, and any significant reasons why this applicant should be considered.
- 3) A letter from the applicant outlining his or her reasons for applying for this scholarship must accompany the application and should include specific examples of contributions to the community and citizenship as well as address character, attitude, academic standing, extracurricular activities, **including sports**, and any significant reasons why you should be considered. ***Please limit your responses to one page.***
- 4) In addition, the following information must be submitted with your application:
 - a. Financial aid package information from your college/university if available.
 - b. A completed copy of the **Federal Student Aid (FAFSA)** form that includes the **Student Aid Report (SAR)** with the **Expected Family Contribution (EFC)** information must accompany this application.

All application materials should be emailed together in PDF format to:

Attention: Jean M. Harrison
jean.m.harrison@bofa.com
Bank of America
The James and Phyllis Tracy Scholarship Foundation

Please contact Jean M. Harrison via email to jean.m.harrison@bofa.com with any questions.

All correspondence and submissions should **include the name of the scholarship and should be PDF format.**

APPLICATIONS RECEIVED AFTER April 15th, 2025, WILL NOT BE PROCESSED

Selection of the Recipient

A Scholarship Selection Committees will review the applications and select the most qualified candidate(s). If no candidate meets the eligibility criteria, no scholarship will be awarded.

Scholarship Amount Awarded

The scholarship will cover **tuition, fees, and books expenses**. If sufficient money is available in The James and Phyllis Tracy Scholarship Foundation, one or more additional scholarship may be awarded to qualified applicants. If more than one applicant is selected to receive a scholarship but there is not enough money in the trust to full fund an additional scholarship a partial scholarship may be awarded.

Payment of Scholarship

Scholarships monies will be paid directly to the institution attended by the recipient.

Other Information

Acceptance and receipt of The James and Phyllis Tracy Scholarship Foundation does not relieve the recipient of the personal responsibility of applying for admission to the college or university, nor does it guarantee his/her admission. After a student is enrolled in a college or university, his/her academic program, social and personal behavior, and involvement in campus affairs are subject only to the policies of the college. The James and Phyllis Tracy Scholarship Foundation does not require courses in the recipient's academic program, involvement in extracurricular activities or personal behavior inconsistent with college policies, except as stated above.

Recipients may attend the college or university of their choice within the United States. Pursuing a course of study in which the college or university offers an alternate year of study outside of the United States will not jeopardize the scholarship.

Applicants who are lineal descendants (children, grandchildren, great-grandchildren) of the Phyllis Tracy Scholarship Foundation are ineligible to apply to the Foundation for scholarship awards. Spouses of ineligible persons are also ineligible.

**JAMES AND PHYLLIS TRACY SCHOLARSHIP FOUNDATION
APPLICATION FORM**

I. PERSONAL INFORMATION

A. Name (Mr./Ms.) _____

B. Home Address _____
Street & Number City State Zip Code

C. Phone # _____ *Email _____

D. Date of Birth _____

E. High School(s) attended with year of graduation: _____

F. Applicant Normally Lives with (Check all that apply)
____ Father ____ Mother ____ Stepfather ____ Stepmother
____ Maintains Own Residence

G. Applicant's Student ID Number (assigned by college) _____

H. Check if any apply:
____ Father Unable to Work
____ Mother Unable to Work
____ Mother is Deceased
____ Father is Deceased
____ Parents are Separated or Divorced

II. INFORMATION CONCERNING FAMILY

A. Father or Male Guardian
Name of Father _____ Age _____
Home Address _____
Occupation & Title _____
Employed By _____ Years with Firm _____

B. Mother or Female Guardian
Name of Mother _____ Age _____
Home Address _____
Occupation & Title _____
Employed By _____ Years with Firm _____

C. Enter Number of Children Parents Will Claim as Tax Dependents on their Federal Income Tax Return for 2024. _____

D. Enter Number of Other Dependents Receiving Financial Support from the Family ____ List other members in your household who will be attending college next year:

Name	College	Grade Next Year	Tuition	Room/ Board	Amt. of Parent Support

III. FAMILY INCOME

A. A completed copy of the **FAFSA** form and **SAR** (indicating expected financial contribution) must accompany this application.

THE FOLLOWING REQUIREMENTS ARE NECESSARY FOR THIS APPLICATION TO BE PROCESSED. Please note: Incomplete applications will not be considered.

Please **conceal** all social security numbers and bank account information

1. The most recent official full (fall and spring) transcript must be submitted with your application. This includes grades and all official test scores (e.g., SAT, CAPT, PLAN, GED, etc.)
2. Financial aid package information from your college/university if available.
3. A completed copy of the **Federal Student Aid (FAFSA)** form that includes the **Student Aid Report (SAR)** with the **Expected Family Contribution (EFC)** information must accompany this application.

Anticipated Expenses for next year:

Tuition: _____

Room & Board: _____

Transportation: _____

Books & Fees: _____

Medical Insurance: _____

Other: _____

TOTAL: _____

(Total required)

DO NOT FILL IN ESTIMATES WITH "UNKNOWN."

Estimated available funds for next year:

Grant from Institution: _____

Stafford Loan: _____

Perkins Loan: _____

Pell Grant: _____

Personal Loan: _____

College Work Study: _____

Parent/Relative: _____

*(If -\$0 - please provide further explanation)

Personal Savings/Job: _____

Scholarships Received: _____

TOTAL ESTIMATED AVAILABLE: _____

(Total required)

COLLEGE INFORMATION

I have applied to the following colleges. Include names, city, and state.

I have been accepted and plan to attend:

Name of College

Address

I have read and understand the terms of this scholarship award and have read the completed application and declare that the information herewith submitted is true to the best of my knowledge and belief.

Student Name (**Please Print**) _____

Signature of Student _____ Date: _____

Signature of Parent _____

Signature of Parent _____

Please attach 1) a list of school and extracurricular activities/sports/volunteer work/awards, and 2) a letter/essay from applicant as outlined in application procedures.

Once completed the application and necessary information in **PDF Format** must be **emailed no later than April 15th. 2025** to:

Attention: Jean M. Harrison jean.m.harrison@bofa.com
Bank of America
The James and Phyllis Tracy Scholarship Foundation