

# ***RICHARDI SCHOLARSHIP***

## ***APPLICATION – 2017 (class of 2015)***

The application is online and can be found at <http://walpolewhs.ss5.sharpschool.com> under the Departments tab, click on School Counseling. There is no paper application. The online form must be submitted and the remaining 4 documents mailed or dropped off at WHS.

Please return the following:

1. W-9 complete with signature, address and social security number (attached)
2. Official college transcript
3. Proof of currently enrolled in college
4. Completed Financial information form (attached)

Richardi Scholarship  
c/o Walpole High School  
275 Common Street  
Walpole, Massachusetts 02081

Failure to include your official transcript and proof of enrollment will make you ineligible. Be sure to check with your college to be certain the transcript has been sent. We will not contact you or the college. If we do not have the transcript on time you will forfeit your chances of receiving a scholarship. Also, please do **NOT** send a resume or any recommendations as they will not be looked at. These documents must be **received** by **2:30 P.M. September 22, 2017.**

### **Applicants must:**

1. **Be a Walpole High School Graduate**
2. **Completed their second year of college and continuing post-secondary education.**

# Financial Information Form

## Applicant

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Last Name	First Name	Middle Name
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Permanent Mailing Address: Street	Apartment #
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Town	State	Zip Code
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## Certification

*All the information on the attached form is true and complete to the best of my (our) knowledge. If asked by an authorized official of the Richardi Scholarship Foundation, I (we) agree to give proof of the information that I (we) have given on this form. I (we) realize that this proof may include a copy of my (our) 2009 U.S. and/or state tax return. I (we) realize that if I (we) do not give proof when asked, the student may not get aid.*

*\*\*I agree that any scholarship funds that I receive will be applied for tuition, fees, books, and other educational expenses specifically required by my classes. The scholarship may also be applied to room & board at the school. Funds not applied by the school to the purposes stated above will be returned to the Foundation. Further, I agree to provide an annual report of my use of the scholarship funds. The report will include a financial statement showing how the scholarship funds were applied. In addition I will provide an official transcript (one obtained from the school and bearing a school seal; internet transcript printouts cannot be accepted) at year-end.*

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Applicant's Signature	Date Completed
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Father's Signature	Date Completed
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Mother's Signature	Date Completed
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*\*\*Explanation from the Funds Coordinator for the Richardi Scholarship: "this is to comply with IRS requirements for a private foundation trust, where we are paying an individual, as opposed to a charity. When we pay an entity that is not classified as a charity by the IRS, or an individual, from a private foundation trust, we are required to exercise what is called expenditure responsibility. To comply with the requirement we must show the IRS that the funds were used for specific purposes that they consider qualified. After completion of their junior year, a simple letter from the recipient accounting for how the funds were spent (ie. Tuition, supplies, etc) and an official transcript of the junior year will meet this IRS requirement."*

## **IMPORTANT TAX INFORMATION REGARDING YOUR SCHOLARSHIP FUNDS**

This Notice is intended to alert you to some possible income tax consequences of scholarship funds you may receive. **The funds are non-taxable to you only to the extent they are used to pay your tuition and related expenses.**

The Internal Revenue Code provides that a student's gross income does not include any amount received in the form of a "qualified scholarship." A scholarship award is considered a "qualified scholarship" only to the extent that it is used to pay for the student's "qualified tuition and related expenses," i.e., tuition and fees required for the enrollment or attendance and other related expenses, such as fees, books, supplies, and equipment required for courses of instruction. **However, scholarship funds used for room and board and other expenses that are not required for enrollment will be deemed taxable income to the recipient. Other examples of such nonqualified expenses include, but are not limited to, food (including a school-sponsored meal plan), health insurance, etc.**

Applying a portion of your scholarship funds to such nonqualified expenses may be perfectly appropriate — even required in some cases — per the terms of your scholarship award letter, but please be aware that such uses will have income tax consequences to you per applicable law.

You should keep certain records detailing the use of the scholarship funds to prove that the funds were used for nontaxable purposes. Keep copies of tuition bills, receipts, cancelled checks, and other records that clearly reflect the use of the scholarship funds. Retain all other documents concerning the scholarship, including copies of your scholarship notification letter, the conditions and requirements of the scholarship, and documents establishing receipt of the scholarship.

Inform your personal income tax return preparer of all expenses paid using scholarship funds so he or she can determine which expenses were nonqualified, if any, and reflect scholarship funds so applied as income on your personal return. If you receive an IRS Form 1099 in connection with this scholarship, provide a copy to your tax advisor in addition to the foregoing information.

Please contact your tax advisor for more details. This Notice was prepared solely on behalf of the Trust from which your scholarship was awarded and is not to be construed as legal or tax advice.

**IRS CIRCULAR 230 NOTICE:** Neither this document nor any attachment hereto is a "covered opinion" as defined by Circular 230. This document is limited to federal tax issues addressed herein and additional issues may exist that would affect the federal tax treatment of any transaction discussed herein. This document (including any attachment) was not intended or written to be used—and cannot be used or relied upon—for the purpose of (i) avoiding penalties under the Internal Revenue Code; or (ii) promoting, marketing or recommending to another party any transaction or matter addressed herein.

# Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

<b>Print or type See Specific Instructions on page 2.</b>	<b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	<b>2</b> Business name/disregarded entity name, if different from above	
	<b>3</b> Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <b>Note.</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____	
	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
	<b>5</b> Address (number, street, and apt. or suite no.)	
	<b>6</b> City, state, and ZIP code	
	<b>7</b> List account number(s) here (optional)	
<b>Requester's name and address (optional)</b>		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

<b>Social security number</b>											
<b>or</b>											
<b>Employer identification number</b>											

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

### Part II Certification

- Under penalties of perjury, I certify that:
- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
  - I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
  - I am a U.S. citizen or other U.S. person (defined below); and
  - The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

<b>Sign Here</b>	<b>Signature of U.S. person ▶</b>	<b>Date ▶</b>
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.  
**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
  - Form 1099-C (canceled debt)
  - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.*
- By signing the filled-out form, you:
- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
  - Certify that you are not subject to backup withholding, or
  - Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
  - Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.