

Robert Hartwig Charitable Trust

(Must be a Resident of the Former Aurelia School District and Cherokee Community School District Only)



Loan Request: \$ _____

A. Personal Information

Name _____
Last Name First Name Middle Initial

Permanent mailing address _____

City _____ State _____ Zip code _____

Social Security Number _____ Date of Birth _____

Phone Number _____ Email address _____

Driver's license number _____ Driver's license state _____

***Attach copy of Driver's License Here*

Name of Father and Mother or guardian _____

Permanent mailing address of Parents or guardian _____

City _____ State _____ Zip code _____

B. Education Information

High School Attended _____ H.S. Graduation Date _____

College to be attended _____

College Address _____

City _____ State _____ Zip code _____

What is your enrollment status? _____ Full Time _____ Part Time

What is your Academic program? If undecided, list three preferences

- Year in school 2021-2022 school year
- Never attended college and 1st year undergraduate
 - Attended college before and 1st year undergraduate
 - 2nd year undergraduate/sophomore
 - 3rd year undergraduate/junior
 - 4th year undergraduate/senior
 - 5th year/other undergraduate
 - 1st year college graduate/professional
 - Continuing graduate/ professional or beyond

- What college degree or certificate working toward 2021-2022 school year
- Bachelor's degree
 - Associate degree (occupational or technical program)
 - Associate degree (general education or transfer program)
 - Certificate or diploma (occupational, technical or education program less than two years)
 - College graduate or professional degree

***Attach last two semesters transcript*

2020-2021 GPA _____ ACT or SAT score _____

C. Financial Information

How much did you earn working in 2020? _____

List any financial assets and the fair market value. (Savings accounts, checking accounts, certificates of deposit, Mutual funds, cash value of life insurance, real estate, vehicles or any other investment)

Asset	Fair Market Value

List source and amount of financial assistance granted for the 2021-2022 school year (scholarships, grants, loans)

Source	Amount

List source and amount of financial assistance granted from parents, guardian or any other individual for the 2021-2022 school year

Source	Amount

List current indebtedness

Creditor Name	Amount	Date Opened	Due Date	Interest Rate	Monthly Payment

Estimated college expenses for the 2021-2022 school year

Item	Estimated Cost
Tuition	
Fees	
Room	
Board	
Books	
Clothing	
Recreation	
Incidentals	
TOTAL	

D. References

Provide names of four individuals who may be contacted for a character reference. Relatives will not be accepted.

Name	Occupation	Phone Number	Address

E. Essay

Answer the following question **“What is my purpose in continuing my education?”** in a 150–200 word essay and attach to this application. Your response should include important life experiences, plans and purposes, how those items have influenced your educational endeavors, and how your plans might be impacted by receipt of funds from this trust.

***Attach Essay*

READ CAREFULLY AND THOROUGHLY

Purpose

Securing a loan from the Robert Hartwig Charitable Trust is a privilege and not a right. The purpose of this fund is to provide financial assistance, in the form of a low interest loan, to graduating seniors who are motivated to succeed in their educational endeavors. An eligible student shall reside either in the Cherokee Community School District as defined at the time of graduation or the former Aurelia School District as defined as being the Aurelia School District prior to its merger with the Alta School District.

Rules and Regulations

The Cherokee State Bank of Cherokee, Iowa is Trustee of the Robert Hartwig Charitable Trust. The board of directors of said bank as Trustee shall constitute the body who shall have the sole power and authority to formulate and promulgate such rules regulations and restrictions consistent with the

objectives and purposes of this trust, under which financial assistance shall be given to applicants, and to pass upon the fitness and need of all applicants for assistance under the terms of this trust.

Any beneficiary who receives a loan from this trust shall be subject to such rules and regulations as may be imposed by the Trustee. The Trustee appointed for this trust reserves the right, and the student concedes to the Trustee the right, to withdraw such aid without liability on the part of the Trustee, when in its judgement the student beneficiary is not making the best use of the opportunities afforded by reason of the aid received.

The Trustee shall keep track of the progress of each beneficiary receiving a loan and when in its judgement such beneficiary is not making the best use of the opportunities afforded by reason of aid received, then it may withdraw such aid or it may continue the same upon such additional terms as may to it seem best.

Of the students selected, the Trustee expects that they will cooperate heartily with the Trustee and the institution of learning which they attend.

Each beneficiary, upon receiving a loan, shall give a written promissory note for same which shall not bear interest unless it is not paid at the time it is due. The loan shall not draw interest until the recipient is no longer a full time student in a college, university, community college, or regularly attending any vocational-technical school. From and after the date the recipient is no longer a full time student the note shall bear simple interest at the rate of 5% per annum on the outstanding balance from and after that date. On the date interest accrues, the outstanding balance shall be amortized to determine the months payments of an equal amount to be made over a maximum of ten years. After the due date of the note, repayment of the loan balance shall be amortized for monthly payments for up to ten years at an interest rate of 5%.

Pledge

The undersigned hereby makes application to the Trustee of the Robert Hartwig Charitable Trust of Cherokee, Iowa, and hereby pledges that: All of the answers in this application are true and correct to the best of my knowledge and belief. The loan proceeds granted to me will not be used for any other purpose than the expenses of my education.

I have read and understand the rules established by the Trustee of the Robert Hartwig Charitable Trust and agree to conform to the terms of repayment set forth therein.

If the loan is awarded to me I further promise:

- To answer promptly (within 6 days) all correspondence relation thereto.
- To keep the school and Trustee of the Robert Hartwig Charitable Trust informed of my contact information (mailing address, email address and phone number) as long as any part of the loan received by me has not been repaid to the Trustee.
- To repay the amount of the loan to the Trustee according to the terms of my agreement.

I recognize that this promise, to answer promptly all correspondence relating to the loan and to keep the school and the Trustee advised of my contact information, is fundamentally important, and that receiving the loan is contingent thereon.

Signature: _____ Date: _____

Internal Use Only

Date:	Amount
<input type="checkbox"/> Approved <input type="checkbox"/> Denied	

Loan Draw Date	Amount