



NAVY-MARINE CORPS RELIEF SOCIETY
ADMIRAL MIKE BOORDA LOAN PROGRAM
Instructions and Application Forms for Academic Year August 2011 through May 2012
Deadline: must be received no later than May 1, 2011

The Admiral Mike Boorda Loan Program (Boorda Program or Boorda) provides financial assistance, in the form of a no interest loan, ranging from \$500 up to \$3,000, for eligible full-time undergraduate students.

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

The Boorda Program:

- **Can only be used in a traditional classroom setting** for items such as: tuition, fees, books, supplies, room and board (on campus), and curriculum-required computers (a letter from the school required for the latter).
- Disbursals are made to the educational institution.
- **Cannot be used for:** correspondence courses, degree at a distance, Internet, or external degree programs.

ELIGIBILITY

- The student must be enrolled in one of the following commissioning programs:
 - Marine Enlisted Commissioning Education Program (MECEP),
 - Medical Enlisted Commissioning Program (MECP), or the
 - Meritorious Commissioning Program (MCP).
- All awards are based on financial need.
- A student must have a minimum cumulative grade point average (GPA) of 2.0 (on a scale of 4.0).
- “Academic year” means August through May only.

TERMS

- Applications received at NMCRS Headquarters no later than May 1, will be evaluated for a loan.
- If received by May 1, but incomplete (i.e. forms and documentation unreadable, documentation not attached, blanks on forms, etc.), the application may be returned as an incomplete submission.
- A student may receive assistance for a maximum of four academic years of undergraduate studies only.
- Applications received after May 1 may not be processed.
- No application will be accepted for the current school year.
- All items on the forms must be completed in full or the application cannot be processed.
- A complete new application package is required for each academic year. Receipt of a loan for one year does not guarantee approval for future years.
- If you choose to accept an interest-free loan, repayment will begin within three months of the student’s anticipated commissioning date. You will receive an annual reminder of your loan status. Be sure to inform the Society of any address/email changes.
- A student may receive assistance for a maximum of four academic years of undergraduate studies only.
- Disbursals directly to the student or any third party are not authorized.
- By completing this form, the student makes application for a loan ranging from \$500 up to \$3,000 for the academic year, which starts three to four months after the May 1st 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 the Eligibility Application Form, Family Financial Data Form (FFDF), Untaxed Income Worksheet, and Grade Point Average (GPA) Verification Form. All four forms are required components of your application for this program, and all requested information must be provided. It is the student's responsibility to provide the Society with the required information. Incomplete forms cannot be processed, and may result in the loss of award eligibility.

STEP 1. THE ELIGIBILITY APPLICATION FORM: Complete the form as follows:

Section A: Fill in all blanks on the Application form. **If you are entering MECEP, MECP, or MCP for the first time, or if you have never enrolled in the Boorda Program, you must also attach a copy of your orders transferring you to the unit/college.**

Section B: Your Commanding Officer, or his designee must complete and sign Section B to verify the eligibility of the student.

The Command, or Student, should mail the completed, endorsed application package to Navy-Marine Corps Relief Society, Education Division **no later than May 1st** (address on last page of these instructions).

STEP 2. FINANCIAL DATA FORM (FFD): Do not submit this form to your college/university's financial aid office.

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

If you do not have finalized income tax information available for the current year, you may use the previous year's return. The listed income and tax figures for the applicant and spouse (if applicable) are to reflect the combined total amount of income and taxes for the most recent tax year, regardless of date of marriage. If a financial item does not apply, indicate by entering "0."

Instructions for line items:

1. Make certain your Social Security number is correct as it identifies you to the Society, our Contractor (ACT), and your college or university's financial aid office.
4. Give the complete name and address (no abbreviations) of the college or university you will be attending during the academic year for which you have applied.
5. State of legal residence is the state where you reside and/or pay state income tax.
7. How many people are in your household? Include:
 - yourself (and your spouse, if you have one), and
 - your children if you provided more than half of their support from July 1 through June 30 of the previous year, and
 - other military dependents, if they now live with you, and you provide more than half of their support, and you provided more than half of their support from July 1 through June 30 of the previous year.
8. Always count yourself as a college student. Do not include your parents. Include other dependent family members only if they will attend at least half time in a program that leads to a college degree or certificate during the academic year for which you are applying.
- 9-10. This information may be on your W-2 forms, or on IRS Form 1040-line 37; 1040A-line 21; or 1040EZ-line 4.
- 11-12. Enter the total amount of your (and your spouse's) income tax paid for last year. Income tax is on IRS Form 1040- line 60; 1040A- Line 37; or Form 1040EZ - line 10.
13. Untaxed income or benefits (worksheet attached):
 - a) Housing allowance or benefits (BAH, BAS): As listed on your last Leave and Earnings Statement (LES) for last year (please report the annual amount you received for last year, even if you occupied government quarters). In some cases, the dollar amount is the market value of base housing occupied during that year. To calculate this amount, go to <https://secureapp2hdqa.pentagon.mil/perdiem/bha.html>. 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. If you are claiming zero, please provide a photocopy of your last LES (December) as documentation.
 - b) Untaxed Social Security benefits: Report the total benefits received for last year.
 - c) Untaxed Temporary Assistance for Needy Families (TANF): Report the total benefits received for last year.
 - d) GI Bill: Report the total benefits received for last year.
 - e) Navy College Fund: Report the total benefits received for last year.
 - f) Other awards received: If you received it, list the value of your NMCRS Admiral Mike Boorda Program loan for the previous year. Also, list any awards received on the lines provided. If you need more room attach a separate page, and put your name and Social Security Number at the top.

Items b, c, d, and e, may be included in the calculation for item a. If they are, please so note at those items on the FFD.

14. Your cash, savings, and checking account balances are to be listed. Other assets (cars, real estate, stocks, bonds, or investments). Do not include any tax deferred retirement savings that would incur an IRS penalty for early withdrawal (such as TSP, IRA and 401k plans).

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 dental expenses, unusual costs related to the student's education – out-of-state fees, [such costs must be verified by the school] or unreimbursed expenses due to a natural disaster), please include a special circumstance letter and substantiating documentation.

- You must enclose documentation for all circumstances.
- Please attach your special circumstances letter to the FFD.

Substantiating documentation (with the student's Social Security number in the upper right corner of each sheet) which provides the direct dollar impact on the income reported on the FFD, must accompany your letter of explanation.

STEP 3. UNTAXED INCOME WORKSHEET: attach as back up for any entries made on the FFD.

STEP 4. GRADE POINT AVERAGE (GPA) VERIFICATION FORM: If a returning applicant, verification of your GPA is a required component of your application for this program. It is the student's responsibility to provide the Society with the requested GPA information. Please refer directly to the form for instructions.

STEP 5. ASSEMBLING THE COMPLETED PACKAGE FOR MAILING: Be sure that all of the required documentation is attached, and 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 – make sure your Commanding Officer, or designee, has signed at Section B, and the required documentation is attached.
- FFD – attach your letter of special circumstances, if any, as well as the Untaxed Income Worksheet. No additional documentation is required unless the line item instructions specifically request it.
- Untaxed Income Worksheet – attach this form to your FFD.
- GPA Form – 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 Programs
875 North Randolph Street Suite 225
Arlington VA 22203

NOTIFICATION OF APPROVAL

Notify NMCRS Education Division immediately of any change of your email and/or mailing address!

Applicants who meet the May 1st deadline will be notified by our Contractor, American College Testing (ACT), of their eligibility for a loan in early August.

If the student will be attending a school other than that listed in the approval /notification letter, he or she must inform ACT and the Society as soon as applicable.

Upon receipt of the notification, ACT will recalculate the student's financial need based on expenses at the student's "new" school.

DISBURSEMENT OF LOAN

ACT disburses loans directly to the school's financial aid office. Checks are made payable to the school, and will be disbursed in mid-August in the amount you requested on your Promissory Note.

If for any reason you lose eligibility for commissioning, unused funds must be returned to NMCRS and repayment arrangements completed. Contact NMCRS to arrange for calculations and schedule for repayment.

OTHER EDUCATION RESOURCES

A list of other web sources is available on the Society's web site (www.nmcrcs.org/education).

CONTACT INFORMATION

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

Address: Navy-Marine Corps Relief Society
Education Programs
875 North Randolph Street Suite 225
Arlington VA 22203-1767

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

Email: education@nmcrcs.org
Web site: www.nmcrcs.org/education

Hours: 8:00AM to 4:00 PM, eastern time



ADMIRAL MIKE BOORDA LOAN PROGRAM
Eligibility Application Form for August 2011 through May 2012

Deadline: must be received no later than May 1, 2011

Please read the instructions before completing this form. Print legibly, in black ink.

A. STUDENT: Complete Items 1-17, then sign and date at Item 18.

1. Commissioning Program: MECEP MECP MCP (Only students in these programs are eligible.)
2. Social Security number: _____ 3. Name: _____
(last, first, middle initial)
4. Street address: _____
City, state, ZIP code: _____
(Notify NMCRS of any change of address. BOOST students, be sure to inform us of your new address when you complete BOOST.)
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 must be the same as the one entered in item 4 of the FFDF.)
Street Address: _____
City, State, Zip Code: _____
Name of Financial Aid Contact: _____ Phone Number: _____
11. Undergraduate grade level beginning in August: Freshman Sophomore Junior Senior
12. Major course of study (entered "Undecided" if unknown at this time): _____
13. Estimated college graduation date (MM/DD/YY): _____
14. Estimated Commissioning Date (MM/DD/YY): _____
15. Current Branch of service: Navy Marine Corps 16. Rank: _____ 17. Pay grade: _____
18. End of Obligated Service (MM/DD/YYYY): _____

19. Student certification:

By my signature below, I certify that the above information is correct to the best of my knowledge. If asked, I agree to provide proof of any information, which may include a copy of my U.S. or state income tax forms. I understand that providing false or misleading information may result in revocation of any award. I am also aware that the Society's assistance is need-based, and that there is no guarantee of approval.

Signature: _____ Print Name: _____ Date: _____

B. COMMAND: This section must be completed by a representative of the student's Command. Please forward all completed forms and the required documentation, and mail them to the Navy-Marine Corps Relief Society. **Please verify that all four forms – Eligibility Application, Family Financial Data, Untaxed Income Worksheet, and Grade Point Average Forms – are complete, that all blanks have been filled in, and that the required documentation is attached.** Please verify the student's Date of Commissioning.

20. Name of Command: _____
21. Street address: _____
City, state, ZIP code: _____
22. Point of contact: _____ 23. Phone: _____
24. Command/Unit Email address: _____

25. Command endorsement:

The information provided by the student is accurate, to the best of our knowledge. The applicant is, or will be, a full-time undergraduate student in the commissioning program indicated above.

Signature: _____ Print Name: _____ Date: _____



ADMIRAL MIKE BOORDA LOAN PROGRAM FINANCIAL DATA FORM

Please read the instructions before completing this form. (Most items have detailed instructions.) Print legibly, in ink.

A. STUDENT INFORMATION:

- 1. Social Security number: _____ 2. Name: _____
(last, first, middle initial)
- 3. Street Address: _____
City, State, ZIP Code: _____
- 4. School you are/will be attending: _____
School Street Address: _____
School City, State, ZIP Code: _____
Contact for mailing check: _____ Phone: _____
- 5. State of legal residence:
- 6. Marital status: Single Married Separated Divorced Widowed
- 7. How many people are in your household? (see Instructions on page 2)
- 8. How many of the people in item 7 will be in college during the academic year for which you are applying?.....

B. STUDENT'S (AND SPOUSE'S, IF MARRIED) PRIOR YEAR INCOME AND ASSETS:

For items 9-14, if the answer is zero or the item does not apply to you, enter 0.

- 9. What was your (and spouse's) adjusted gross income for last year? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.....
- 10. How much did you earn from working (wages, salaries, tips, etc.) for last year? Answer this question whether or not you filed a tax return.....
- 11. How much did your spouse earn from working (wages, salaries, tips, etc.) for last year? Answer this question whether or not you/your spouse filed a tax return.....
- 12. Enter the total amount of your (and spouse's) income tax for last year. Income tax amount is on IRS Form 1040—line 60; 1040A—line 37; or 1040EZ—line 11. (Tax withheld less expected tax refund = actual tax paid)
- 13. Untaxed Income and benefits (see FDF instructions on pages 2 and 3, and worksheet on following page):
 - a) Housing allowance and benefits (BAH, BAS) total for year: _____
 - b) Untaxed Social Security: _____
 - c) Untaxed Temporary Assistance for Needy Families (TANF): _____
 - d) GI Bill: _____
 - e) Navy College Fund: _____
 - f) Other grants and loans received:
 - Previous Boorda loans: \$ _____
 - _____ \$ _____
 - _____ \$ _____
 - _____ \$ _____
 - _____ \$ _____

Total, other grants and loans \$ _____

Total untaxed income and benefits:
- 14. Student's and spouse's cash, savings, and checking account balances:

15. Student Certification:

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 on this form will result in the termination of any grant application or award. If asked by the Society, I agree to give proof of the information that I have provided on this form.

Signature: _____ Date: _____



ADMIRAL MIKE BOORDA LOAN PROGRAM FINANCIAL DATA FORM

UNTAXED INCOME WORKSHEET Item 13 of Financial Data Form

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 2009, 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.

Student Name: _____

ITEM 13:

Monthly Figure Annual Figure

a. Active Duty

- Basic Allowance for Subsistence (BAS) from your LES or current pay tables. _____ x 12 = _____

- 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 2009, your duty station ZIP code, and your rank. Click on Execute to get the monthly rate. _____ x 12 = _____

- Members deployed to a tax-exempt area for any part of 2009 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. _____

- Any other special allowances that are untaxed. Check with your Finance Office if you are not sure. _____

Annual Total Item a. \$ _____

*** Enter this total at Item 13.a. on the FDF**

b. Any other annual untaxed income such as

Social Security: \$ _____

Temporary Assistance to Needy Families (TANF): \$ _____

GI Bill: \$ _____

Navy College Fund: \$ _____

Annual Total item b: _____

Annual Total Items a and b: \$ _____



ADMIRAL MIKE BOORDA LOAN PROGRAM Grade Point Average Verification Form

Deadline: must be received no later than May 1, 2011

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 registrar's office complete the form.

IF YOU ARE NOT LOCATED NEAR YOUR SCHOOL, OR IF THE SCHOOL CANNOT OR WILL NOT COMPLETE THE FORM, THEN LEAVE SECTION B BLANK. IN PLACE OF THIS FORM, 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: a copy of a transcript, a grade report, or a certificate of good standing from your registrar's office, or your Command, can be accepted in place of a transcript.

Any grade documentation submitted must show the student's name and Social Security number, and a cumulative GPA (or average percentage score or letter grade).

It is the student's responsibility to provide the Society with the required GPA information. Do not rely on the school to send it.

A. STUDENT:

1. Social Security number: _____ 2. Name: _____
(last, first, middle initial)

3. Student authorization:

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

Student Signature: _____ Print Name: _____ Date: _____

B. SCHOOL:

This student is applying for a no interest loan from the Navy-Marine Corps Relief Society. Grade information must be provided by the May 1st deadline. Your assistance is appreciated. If you choose not to complete Section B, you may attach a transcript or certificate of good academic standing. Please return it to the student without delay, so that he/she may submit all forms required for our scholarship. Questions? Call NMCRS Education Division at (703) 696-4960.

4. School name: _____

School address: _____

School city, state, ZIP code: _____

5. Cumulative GPA: _____

If not using a 4.0 scale, please indicate the grading scale: _____

6. Current year in school: Freshman Sophomore Junior Senior

7. Representative's name: _____

8. Representative's title: _____

9. Telephone number: _____

10. Email address: _____

11. School certification:

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

Representative's signature (required): _____ Print Name: _____

Date: _____