

## Applicant Information

Student's Full Name	Date of Birth
Street Address	City, State, Zip
Home Phone	Cell Phone
E-mail	
Year of College	Grade Point Average
Intended Graduation Date	
Parent/Legal Guardian's Name	Parent/Guardian Daytime Phone

## Certification & Official Release

I certify that all information in this application is complete, accurate, and my original work. If awarded a Chester County Estate Planning Council Scholarship, I give the Chester County Estate Planning Council the right to:

Yes  No: Release my name, school, and town in which I live in promotional materials (website, newspapers, etc.)

Yes  No: Use my photo in promotional materials

Applicant's Signature \_\_\_\_\_

\_\_\_\_\_ Date

Parent/Legal Guardian, if applicant is under 18\* \_\_\_\_\_

\_\_\_\_\_ Date

*\*For students under the age of 18 at date of entry, a parent or legal guardian must co-sign this release.*

The **Chester County Estate Planning Council Marc P. Riddell Scholarship Fund** is a fund of the Chester County Community Foundation, a charitable 501(c)(3) entity. A copy of the official registration and financial information for the Chester County Community Foundation may be obtained by calling the PA Department of State at 1-800-732-0999 (toll-free in PA). Registration does not imply endorsement.

EIN 23-2773822.



## Marc P. Riddell Memorial Scholarship Application

The Chester County Estate Planning Council includes attorneys, trust officers, accountants, financial planners, wealth managers, investment planners, stockbrokers, insurance agents, appraisers, realtors, and nonprofit planned giving officers, as well as other specialists in related professions serving Chester County, PA.

### What is Estate Planning?

Estate Planning is the process of anticipating and arranging for the protection, orderly administration, and disposition of a client's wealth in accordance with their wishes, upon the occurrence of major events such as birth, marriage, divorce, incapacity, and death. Significant attention is paid to minimizing taxes and administration expenses. Estate planning requires knowledge of state property, probate, and trust laws; and federal and state income, gift, inheritance, estate, and generation-skipping transfer tax laws. Some estate planning areas include:

- Creating a will
- Setting up durable power of attorney
- Naming an estate executor to oversee the terms of the will
- Establishing a guardian for living dependents
- Creating/updating beneficiaries on plans such as life insurance, IRAs and 401(k)s
- Setting up trust accounts in the name of beneficiaries
- Philanthropy planning to arrange for estate gifts to charities.

## Guidelines

**THE PURPOSE** of the **Chester County Planning Council Marc P. Riddell Scholarship Fund** is to award \$500 or \$1,000 academic scholarships to West Chester University students entering junior or senior year, pursuing studies and considering a career in estate planning.

Additionally, the CCEPC Scholarship includes a complimentary membership to the Chester County Estate Planning Council during the student's college years, and for two (2) years post-graduation. CCEPC's goal is to offer students invaluable networking and learning opportunities as they pursue careers in the estate planning field.

### ELIGIBILITY REQUIREMENTS

Scholarships are awarded on a competitive basis to students who, in the judgment of the Chester County Estate Planning Scholarship Committee, best meet the following requirements:

- GPA of at least 3.0
- Reference letter from a WCU faculty member
- Strong leadership skills
- Strong spirit of volunteerism/motivation to help others
- Strong aspirations in estate planning field

### SUBMISSION CHECKLIST

Applicant Information Form	<input type="checkbox"/> Complete
Certification & Official Release Form	<input type="checkbox"/> Complete
Essay (must be original work)	<input type="checkbox"/> Complete
Resume	<input type="checkbox"/> Complete
Reference Letter from WCU Faculty	<input type="checkbox"/> Complete

Check here if you have filled out the FASFA form, to be eligible for matching PHEAA funds.

### SCHOLARSHIP DISTRIBUTION

CCEPC scholarship awards are announced 4-8 weeks after the application deadline.



## Application Essay

Please answer these questions, in a brief essay of 1,000 words or less:

- **What interests you about exploring estate planning as a career?**
- **How does estate planning fit in with your studies and career aspirations at this point?**

### Application Deadline:

**Dec 1 & May 1 annually**

**Applications accepted only electronically.**

E-mail this filled-out form & your essay to [info@chescoepc.org](mailto:info@chescoepc.org) or apply online at:

[http://www.chescoepc.org/scholarship\\_application.htm](http://www.chescoepc.org/scholarship_application.htm)

### Questions?

Contact: CCEPC Scholarship Administrator  
CCCF, 28 W. Market Street, West Chester PA 19382  
(610) 696-8211 [chescoepc.org](http://chescoepc.org) [info@chescoepc.org](mailto:info@chescoepc.org)