



James R. Smith Scholarship Program

James R. Smith represented ITT Corporation during his 46-year membership with the then "Corporate Transfer Agents Association" (CTA). He was elected to the CTA Board of Directors in 1971 where he served as the Association's President from 1985-1987 and retired from the Board in late 1993, but maintained an active role as consultant to the Board until his full retirement in 2004. Jimmy Smith is particularly noted for his selfless dedication to the Association, for the spirit of camaraderie he has fostered among the membership and for the cooperation and diligence he has

shown in working with the Board of Directors. It is because of these traits this scholarship has been dedicated to the man who has become known as "Mr. CTA".

In 2006, the CTA changed its name to Shareholder Services Association (SSA).

THE PROGRAM

SSA has established the James R. Smith Scholarship Program to assist members' children who plan to continue education in college or vocational school programs. Renewable scholarships are offered each year for full-time study at an accredited institution of the student's choice.

This scholarship program is administered by Scholarship Management Services[®], a division of Scholarship America[®]. Scholarship Management Services is the nation's largest designer and manager of scholarship and tuition reimbursement programs for corporations, foundations, associations and individuals. Awards are granted without regard to race, color, creed, religion, sexual orientation, gender, disability or national origin.

ELIGIBILITY

Applicants to the James R. Smith Scholarship Program must be -

- ◆ Dependent* children, age 23 and under, of SSA members in good standing for a minimum of one year as of the application deadline date.

**Dependent children are defined as natural and legally adopted children or stepchildren living in the member's household or primarily supported by the member.*

- ◆ High school seniors or graduates who plan to enroll or students who are already enrolled in a full-time** undergraduate course of study at an accredited two- or four-year college, university, or vocational-technical school.

***Full-time study is defined as full-time enrollment for the entire upcoming academic year.*

AWARDS

If selected as a recipient, the student will receive a \$1,000 award. One award will be granted, as long as there are a minimum of three qualified applicants. Awards may be renewed for up to three additional years or until a bachelor's degree is earned, whichever occurs first. Renewal is contingent upon satisfactory academic performance in a full-time course of study, continued SSA membership of the student's parent, and continuation of the program by SSA.

Awards are for undergraduate study only.

APPLICATION

Interested students must complete the application and mail it along with a current, complete transcript of grades to Scholarship Management Services postmarked after November 1, but no later than **December 31**. Grade reports are not

acceptable. Online transcripts must display student name, school name, grade and credit hours earned for each course, and term in which each course was taken. Applicants will receive acknowledgment of receipt of their application. If an acknowledgment card is not received within three weeks, applicants may call Scholarship Management Services to verify that the application has been received.

Applicants are responsible for gathering and submitting all necessary information. Applications are evaluated on the information supplied; therefore, answer all questions as completely as possible. Incomplete applications will not be evaluated. All information received is considered confidential and is reviewed only by Scholarship Management Services.

SELECTION OF RECIPIENTS

Scholarship recipients are selected on the basis of academic record, demonstrated leadership and participation in school and community activities, honors, work experience, statement of goals and aspirations, unusual personal or family circumstances, and an outside appraisal. Financial need is not considered.

Selection of recipients is made by Scholarship Management Services. In no instance does any officer or member of the SSA play a part in the selection. All applicants agree to accept the decision as final.

Applicants will be notified in late February. Not all applicants to the program will be selected as recipients. Students may reapply to the program each year they meet eligibility requirements.

PAYMENT OF SCHOLARSHIPS

Scholarship Management Services processes James R. Smith scholarship payments on behalf of the SSA. The payment will be made in one installment on August 15. A check is mailed to the recipient's home address and made payable to the school for the student. A renewal form will be mailed to the recipient on December 30.

OBLIGATIONS

Recipients have no obligation to the SSA. They are, however, required to notify Scholarship Management Services of any changes in address, school enrollment, or other relevant information and to send a complete transcript when requested.

REVISIONS

SSA reserves the right to review the conditions and procedures of this scholarship program and to make changes at any time including termination of the program.

ADDITIONAL INFORMATION

Questions regarding the scholarship program should be addressed to:

James R. Smith Scholarship Program
Scholarship Management Services – Randy Haley
One Scholarship Way
Saint Peter, MN 56082
Telephone: (507) 931-1682

