INSTRUCTIONS FOR COMPLETING THE
FINANCIAL DATA SECTION OF THE
APPLICATION
The Financial Data section of the application should be
completed by the student (or parent if a dependent).
Information should be from a completed tax return or based on
estimated information to be filed with the IRS/Revenue Canada.

STATE/PROVINCE OF RESIDENCE is the state/province where
the student (or parent if a dependent) resides and pays
state/province income tax.

ADJUSTED GROSS INCOME can be found on IRS FORM
1040 and is gross income reduced by specific adjustments
allowed by law. For Canadian applicants, report Taxable
Income.

U.S./CANADIAN TOTAL FEDERAL TAX PAID includes
the total amount of federal income tax to be paid. This is not the
amount withheld from the employee's paychecks. (The amount
withheld should be adjusted by any refund or additional taxes
due.) Do not report state/province income tax.

TOTAL INCOME of student and spouse (or parent(s) if a
dependent) should be reported individually. Provide information
for both natural parents (if student is a dependent), when
possible. If the student resides with only one parent, financial
information must be received from the parent who claims the
child as a dependent for tax purposes. If a parent has
remarried, the spouse's information is required if the spouse is a
legal guardian of the student, or claims the student as a
dependent, or the student is included in spouse's benefit plan. If
necessary two Financial Data sections may be submitted by the
student. A copy of the Financial Data section may be made in
order for one to be completed by each parent.

UNTAXED INCOME AND BENEFITS (For U.S. applicants
only) include any other income or benefits not included in the
adjusted gross income figure. Do not include untaxed
contributions to retirement plans.

MEDICAL AND DENTAL EXPENSES include only those
expenses not paid
by insurance. Do not include premium
payments.

TOTAL CASH, CHECKING, SAVINGS, CASH VALUE
OF STOCKS, ETC. include liquid assets that can be used for
educational expenses. Do not include IRA, 401k, or other
retirement plan funds.

TOTAL NUMBER OF FAMILY MEMBERS LIVING IN
THE HOUSEHOLD and primarily supported by the reported
income may include:
• the applicant
• the applicant's parents
• other children living in the household
• dependent college students living away from home
• other people who live in the household and receive more than
half of their support from the reported income. Independent
students should only report those individuals who are supported
by the reported income.

MARITAL STATUS is the current status of the parents (or
student if independent) from whom the financial information is
submitted.

OF THE TOTAL NUMBER OF FAMILY MEMBERS,
NUMBER OF STUDENTS ATTENDING COLLEGE
includes family members attending a two- or four-year college,
university, or vocational-technical school at least half-time.
Include the applicant in this number. Do not include parents.

NOTE: Any exceptions to providing financial information as
instructed above must be submitted to Scholarship Management
Services in writing.
THE PROGRAM
Walman Optical Company has established a scholarship program to encourage and assist students at schools and colleges of Optometry. Scholarships are offered each year for full-time study at participating schools selected by Walman Optical Company.

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, age, gender, disability, or national origin.

ELIGIBILITY
Applicants to the Walman Optical Company Scholarship Program must be students -

- currently enrolled in the second or third year of a full-time four-year post-graduate program leading to a Doctor of Optometry degree.

AWARDS
If selected as a recipient, the student will receive an award ranging from $1,000 to $4,000. Awards are not renewable, but students may reapply to the program each year they meet eligibility requirements.

Awards may be used for education-related expenses and are only for post-graduate study leading to a Doctor of Optometry degree at one of the designated schools.

APPLICATION
Interested students must complete the attached application and mail it along with the required transcript of grades to Scholarship Management Services postmarked no later than April 10. 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. A complete transcript is required from the college of Optometry the applicant currently attends.

Applicants are responsible for gathering and submitting all necessary information. Instructions for completing the Financial Data section of the application are found on the reverse side of this brochure. Applications are evaluated on the information supplied; therefore, answer all questions as completely as possible. 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. Once scholarship recipients are selected, financial data is reviewed to determine the amount of each award, ranging from $1,000 to $4,000.

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

Applicants will be notified by the end of May. 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 scholarship payments on behalf of Walman Optical Company. Payments are made in equal installments on August 15 and December 30. Checks are mailed to each recipient’s home address and are made payable to the school for the student.

OBLIGATIONS
Recipients have no obligation to Walman Optical Company. 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
Walman Optical Company 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:

Walman Optical Company Scholarship Program
Scholarship Management Services
One Scholarship Way
Saint Peter, MN 56082

Telephone: (507) 931-1682