

## Applicant Information

Student's Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Street Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home 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 this application is accurate, and my original work. If awarded a 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 Merit Scholarship

The Chester County Estate Planning Council brings together attorneys, trust officers, accountants, financial planners, wealth managers, investment planners, stockbrokers, insurance agents, appraisers, realtors and nonprofit planned giving officers.

## What is Estate Planning?

- Estate Planners arrange for the protection, orderly administration and disposition of a client's wealth in accordance with their wishes.
- Estate planners are especially called upon for major life events such as birth, marriage, divorce, sudden money, inheritance, business succession, incapacity and death.
- Estate planning requires expertise in state property, probate and trust laws; and tax laws—federal and state income, gift, inheritance, estate, and generation-skipping transfer tax.
- 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

⇒ Deciding 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 Chester County Planning Council Marc P. Riddell Scholarship awards :

- \$1,000 academic scholarships
- to West Chester University students
- entering junior or senior year
- studying business, accounting, finance or pre-law.

The CCEPC Scholarship includes complimentary CCEPC membership:

- for CCEPC monthly meetings during the student's college years, and
- for CCEPC monthly meetings 2 years post-graduation.

CCEPC meetings offer students networking, mentoring, and learning opportunities as they consider careers in the estate planning field.

### ELIGIBILITY

Scholarships are awarded on a competitive basis to students with a GPA of at least 3.0 who, in the judgment of the CCEPC Scholarship Committee, best exemplify:

- Strong leadership skills
- Strong spirit of volunteerism/motivation to help others
- Strong aspirations to explore an estate planning profession

### SUBMISSION CHECKLIST

Applicant Info Form	<input type="checkbox"/> Complete
Certification & Official Release Form	<input type="checkbox"/> Complete
Original Essay	<input type="checkbox"/> Complete
Resume	<input type="checkbox"/> Complete
2 Reference Names with Contact Info	<input type="checkbox"/> Complete

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

### SCHOLARSHIP DISTRIBUTION

CCEPC scholarships are awarded 6-12 weeks after the application deadline.



## Application Essay

Please answer in a brief statement:

- What interests you about exploring one of the estate planning careers?
- What are your career aspirations?

## Application Deadline March 31st annually

E-mail completed application to [info@chescoepc.org](mailto:info@chescoepc.org)

### Questions?

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