

Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**

or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning **APR 1, 2017** and ending **MAR 31, 2018**

Name of foundation

A Employer identification number

GERTRUDE S. STRAUB TRUST ESTATE**99-6003243**

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

P.O. BOX 3170, DEPT. 715

B Telephone number

(808) 694-4543

City or town, state or province, country, and ZIP or foreign postal code

HONOLULU, HI 96802C If exemption application is pending, check here ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1 Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

J Accounting method:

☒ Cash☐ AccrualF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

(from Part II, col (c), line 16)

☐ Other (specify)Fair market value of all assets at end of year: **\$ 7,735,460.** (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		1,756.	1,756.		STATEMENT 1
4 Dividends and interest from securities		169,890.	169,890.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		161,186.			
b Gross sales price for all assets on line 6a		875,972.			
7 Capital gain net income (from Part IV, line 2)			161,186.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		104.	0.		STATEMENT 3
12 Total Add lines 1 through 11		332,936.	332,832.		
13 Compensation of officers, directors, trustees, etc		83,793.	50,276.		33,517.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		2,000.	600.		1,400.
c Other professional fees					
17 Interest					
18 Taxes		565.	565.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		29,202.	102.		29,100.
24 Total operating and administrative expenses Add lines 13 through 23		115,560.	51,543.		64,017.
25 Contributions, gifts, grants paid		282,935.			282,935.
26 Total expenses and disbursements Add lines 24 and 25		398,495.	51,543.		346,952.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-65,559.			
b Net investment income (if negative, enter -0-)			281,289.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			3,933.	4,579.	4,579.
	2 Savings and temporary cash investments			147,183.	232,326.	232,326.
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock					
	c Investments - corporate bonds					
	Liabilities	11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other STMT 7				6,316,777.	6,167,304.	7,498,555.
14 Land, buildings, and equipment: basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)				6,467,893.	6,404,209.	7,735,460.
17 Accounts payable and accrued expenses						
18 Grants payable						
Net Assets or Fund Balances	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)			0.	0.		
Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	27 Capital stock, trust principal, or current funds			6,467,893.	6,404,209.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds			0.	0.	
	30 Total net assets or fund balances			6,467,893.	6,404,209.	
31 Total liabilities and net assets/fund balances			6,467,893.	6,404,209.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	6,467,893.
2 Enter amount from Part I, line 27a	2	-65,559.
3 Other increases not included in line 2 (itemize) ▶ RETURNED PRIOR YEAR GRANT	3	1,875.
4 Add lines 1, 2, and 3	4	6,404,209.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	6,404,209.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 122,849.		112,369.	10,480.
b 724,091.		602,417.	121,674.
c 29,032.			29,032.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			10,480.
b			121,674.
c			29,032.
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2 161,186.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3 N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	339,859.	7,036,596.	.048299
2015	306,762.	6,989,936.	.043886
2014	344,208.	7,464,264.	.046114
2013	349,413.	7,191,775.	.048585
2012	328,004.	6,906,824.	.047490

2 Total of line 1, column (d)	2 .234374
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 50, or by the number of years the foundation has been in existence if less than 5 years	3 .046875
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4 7,588,401.
5 Multiply line 4 by line 3	5 355,706.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6 2,813.
7 Add lines 5 and 6	7 358,519.
8 Enter qualifying distributions from Part XII, line 4	8 346,952.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	5,626.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	5,626.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	5,626.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a	2,917.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	2,917.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	2,709.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> <u>HI</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► BANK OF HAWAII Telephone no. ► 808-694-4543 Located at ► 130 MERCHANT STREET, HONOLULU, HI ZIP+4 ► 96813		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

	Yes	No
5a During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A	
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
If "Yes" to 6b, file Form 8870.		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BANK OF HAWAII	TRUSTEE			
P.O. BOX 3170				
HONOLULU, HI 96802	1.00	83,793.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

(c) Compensation

NONE

Total number of others receiving over \$50,000 for professional services

Part IX-A	Summary of Direct Charitable Activities
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List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1	N/A
---	-----

2

3

4

Part IX-B	Summary of Program-Related Investments
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Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1	N/A
---	-----

2

All other program-related investments See instructions.

3

Total. Add lines 1 through 3

0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	7,530,938.
b	Average of monthly cash balances	1b	173,022.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	7,703,960.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	7,703,960.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	115,559.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7,588,401.
6	Minimum investment return Enter 5% of line 5	6	379,420.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1 Minimum investment return from Part X, line 6		1	379,420.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	5,626.
b	Income tax for 2017 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	5,626.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	373,794.
4	Recoveries of amounts treated as qualifying distributions	4	1,875.
5	Add lines 3 and 4	5	375,669.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	375,669.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	346,952.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	346,952.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	346,952.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				375,669.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			131,796.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2017.				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2017 from Part XII, line 4. ▶ \$ 346,952.				
a Applied to 2016, but not more than line 2a			131,796.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2017 distributable amount				215,156.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d) the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below	0.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				160,513.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

Part XIV Private Operating Foundations (see instructions and Part VII A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test - enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed.

SEE STATEMENT GUIDE-1

b The form in which applications should be submitted and information and materials they should include:

SEE STATEMENT GUIDE-1

c Any submission deadlines.

SEE STATEMENT GUIDE-1

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.

SEE STATEMENT GUIDE-1

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT GRANTS-1	NONE			282,935.
Total			3a	282,935.
b Approved for future payment				
NONE				
Total			3b	0.

Form 990-PF (2017)

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
BOH #115026106	1,756.	1,756.	
TOTAL TO PART I, LINE 3	1,756.	1,756.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BOH #115026106	198,922.	29,032.	169,890.	169,890.	
TO PART I, LINE 4	198,922.	29,032.	169,890.	169,890.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
THE BLACKSTONE GROUP L.P.	104.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	104.	0.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX SERVICE FEE	2,000.	600.		1,400.
TO FORM 990-PF, PG 1, LN 16B	2,000.	600.		1,400.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	565.	565.		0.
TO FORM 990-PF, PG 1, LN 18	565.	565.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADR/ADS FEES	102.	102.		0.
ADMINISTRATION FEES	29,100.	0.		29,100.
TO FORM 990-PF, PG 1, LN 23	29,202.	102.		29,100.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT INV	COST	6,167,304.	7,498,555.
TOTAL TO FORM 990-PF, PART II, LINE 13		6,167,304.	7,498,555.

GERTRUDE S. STRAUB TRUST
EIN: 99-6003243
FORM 990-PF, PART II, LINE 13
OTHER INVESTMENTS
FYE 3/31/2018

Description	Units	Tax Cost	Market Value
00206R102 AT&T INC	290 000	8,375 46	10,339.00
00817Y108 AETNA INC NEW	35 000	3,822 20	5,915 00
017175100 ALLEGHANY CORP	16 000	7,950 92	9,831 00
020002101 ALLSTATE CORP	120 000	3,833 01	11,376 00
02079K305 ALPHABET INC CL A	28.000	16,599 80	29,040.00
025816109 AMERICAN EXPRESS CO	135 000	9,275 75	12,593 00
032095101 AMPHENOL CORP CL A	235 000	13,309 53	20,241 00
037833100 APPLE INC	315 000	14,072 72	52,851 00
046353108 ASTRAZENECA PLC SP ADR	410 000	12,156 33	14,338 00
053807103 AVNET INC	70 000	3,194.10	2,923.00
066922204 ISHARES S&P 500 INDEX FUND	3,106 908	769,518.66	977,340.00
084670702 BERKSHIRE HATHAWAY INC CL B	130 000	10,751 10	25,932.00
09247X101 BLACKROCK INC	16 000	5,432 94	8,668 00
09253F879 ISHARES MSCI EAFE INTERNATIONAL INDEX FUND	27,267 231	308,119 71	383,650 00
09857L108 BOOKING HOLDINGS INC	17 000	16,885.36	35,367.00
099724106 BORGWARNER INC	170 000	6,588 98	8,539 00
11133T103 BROADRIDGE FINANCIAL SOLUTIONS	95 000	7,305 74	10,421 00
126650100 CVS/CAREMARK CORP	60 000	4,698 60	3,733.00
151020104 CELGENE CORP	150 000	16,847 61	13,382 00
166764100 CHEVRON CORP	105 000	8,467 46	11,974.00
17275R102 CISCO SYSTEMS	290 000	9,564 46	12,438 00
172967424 CITIGROUP INC	255 000	17,561 94	17,213 00
192446102 COGNIZANT TECH SOLUTIONS CORP	290 000	10,793 86	23,345 00
22410J106 CRACKER BARREL OLD COUNTRY	70 000	11,942 00	11,144 00
256206103 DODGE & COX INTERNATIONAL STOCK FUND	2,780 759	100,357 59	126,052 00
256746108 DOLLAR TREE INC	245 000	19,390.97	23,251 00
25746U109 DOMINION ENERGY INC	225 000	10,561 48	15,172.00
278865100 ECOLAB INC	95 000	10,574 45	13,022 00
30212P303 EXPEDIA GROUP INC	65.000	7,737 94	7,177 00
30231G102 EXXON MOBIL CORP	170 000	13,849.68	12,684.00
30303M102 FACEBOOK INC CL A	25.000	4,373 75	3,995.00
311900104 FASTENAL CO	265 000	12,911 25	14,466 00
31428Q101 FEDERATED TOTAL RETURN BOND FUND	52,038 867	576,560 23	554,734 00
337932107 FIRSTENERGY CORP	120 000	3,819 60	4,081 00
343412102 FLUOR CORP NEW	115.000	4,391 83	6,580 00
369604103 GENERAL ELECTRIC CO	310 000	5,082 76	4,179.00
370334104 GENERAL MILLS INC	115 000	6,011 85	5,182.00
375558103 GILEAD SCIENCES INC	170.000	12,845 80	12,816 00
38144N593 GOLDMAN SACHS INTERNATIONAL SMALL CAP INSIGHTS I	14,213 007	166,317 24	182,353 00
40434L105 HP INC.	690 000	11,302 24	15,125 00
411511306 HARBOR INTL FD	1,365 175	99,453 26	91,644 00
44267D107 THE HOWARD HUGHES CORP	35.000	4,063 77	4,870.00
46625H100 JP MORGAN CHASE & CO	235 000	9,215 97	25,843 00
47803W406 JOHN HANCOCK III DISC M/C-IS	11,995 833	155,945 83	278,543 00
478160104 JOHNSON & JOHNSON	175 000	11,891 90	22,426 00

GERTRUDE S. STRAUB TRUST
 EIN: 99-6003243
 FORM 990-PF, PART II, LINE 13
 OTHER INVESTMENTS
 FYE 3/31/2018

Description	Units	Tax Cost	Market Value
494368103 KIMBERLY CLARK CORP	155.000	9,920.99	17,070 00
500472303 KONINKLIJKE PHILIPS NV NY SHR	215 000	6,899.35	8,237 00
501044101 KROGER CO	360 000	11,162.15	8,618.00
559222401 MAGNA INTERNATIONAL INC CL A	210 000	9,032 25	11,834.00
57636Q104 MASTERCARD INC CLASS A	165 000	16,338 44	28,901.00
577130834 MATTHEWS PACIFIC TIGER FUND CL INS	3,221 684	93,643 03	101,096 00
577933104 MAXIMUS INC	285.000	14,868 88	19,021 00
58155Q103 MCKESSON CORP	30 000	4,977 30	4,226 00
58933Y105 MERCK & CO INC	390 000	15,138 94	21,243.00
594918104 MICROSOFT CORP	130.000	3,199 90	11,865.00
596278101 MIDDLEBY CORPORATION	105 000	10,768 38	12,998.00
61166W101 MONSANTO CO	80.000	7,700.20	9,335 00
61945C103 THE MOSAIC COMPANY	475 000	11,343 00	11,533 00
637071101 NATIONAL OILWELL VARCO INC	255 000	11,090 80	9,387 00
651639106 NEWMONT MINING CORP HLDG CO	270.000	4,923 91	10,549 00
654106103 NIKE INC CL B	120 000	6,472 51	7,973.00
655044105 NOBLE ENERGY INC	255 000	8,495 25	7,727 00
670100205 NOVO NORDISK A S ADR	420 000	20,864 97	20,685 00
693475105 PNC FINANCIAL SERVICES	80 000	8,327 75	12,099.00
69351T106 PPL CORPORATION	155 000	4,033 43	4,385 00
713448108 PEPSICO INC	115 000	8,525 35	12,552 00
717081103 PFIZER INC	185 000	6,183 63	6,566 00
718172109 PHILIP MORRIS INTERNATIONAL	170 000	10,304 67	16,898 00
718546104 PHILLIPS 66	240 000	21,019 40	23,021 00
74144Q203 T ROWE PRICE INSTITUTIONAL EMERGING MARKETS EQU	2,466 102	73,162 04	104,217 00
742718109 PROCTER & GAMBLE CO	175 000	10,594 27	13,874.00
74316J458 CONGRESS MID CAP GROWTH-INS	17,553.424	237,322 30	333,164.00
747525103 QUALCOMM INC	160 000	7,052 60	8,866 00
755111507 RAYTHEON CO	55 000	6,816 10	11,870 00
780259206 ROYAL DUTCH SHELL PLC ADR A	120 000	6,021 00	7,657 00
806857108 SCHLUMBERGER LTD	70 000	5,029 57	4,535.00
824348106 SHERWIN-WILLIAMS CO	70 000	21,000 69	27,448 00
832696405 JM SMUCKER CO/THE NEW COMMON	35 000	4,214 70	4,340 00
844741108 SOUTHWEST AIRLINES	90 000	4,075 70	5,155 00
855244109 STARBUCKS CORP	365 000	21,146.72	21,130 00
857477103 STATE STREET CORP COMMON	80 000	5,306 65	7,978 00
872540109 TJX COMPANIES INC	295 000	22,513 45	24,060 00
883556102 THERMO FISHER SCIENTIFIC INC	115 000	15,884 33	23,743.00
887317303 TIME WARNER INC	100 000	8,105 39	9,458 00
89151E109 TOTAL SA SP ADR	75 000	3,837 14	4,327 00
902973304 US BANCORP	235.000	6,899 79	11,868 00
907818108 UNION PACIFIC CORP	160 000	12,920.00	21,509 00
911312106 UNITED PARCEL SERVICE CL B	35 000	3,855 60	3,663 00
913017109 UNITED TECHNOLOGIES CORP	95 000	9,335 65	11,953 00
921909818 VANGUARD TOTAL INTL ST INDEX FUND-ADM	18,651 120	482,774 92	565,129 00

GERTRUDE S. STRAUB TRUST
 EIN: 99-6003243
 FORM 990-PF, PART II, LINE 13
 OTHER INVESTMENTS
 FYE 3/31/2018

Description	Units	Tax Cost	Market Value
921937603 VANGUARD TOTAL BOND MARKET INDEX FUND ADM	105,556 624	1,142,310 03	1,110,456 00
922908728 VANGUARD TOTL STK MKT IND-AD	20,676 703	974,202 55	1,365,696 00
92826C839 VISA INC CL A SHARES	170 000	3,109 53	20,335.00
92857W308 VODAFONE GROUP PLC SP ADR	200 000	5,082.00	5,564 00
931142103 WALMART INC	155 000	8,700 01	13,790.00
931427108 WALGREENS BOOTS ALLIANCE INC	135 000	11,221 01	8,838 00
949746101 WELLS FARGO COMPANY	400.000	19,705 85	20,964 00
94984B348 WELLS FARGO ADVANTAGE INTERNATIONAL EQUITY FUNI	9,592 195	102,521 08	126,905 00
962166104 WEYERHAEUSER CO	105 000	3,159 45	3,675.00
984121608 XEROX CORP	310 000	10,060 74	8,922.00
G0177J108 ALLERGAN PLC	90 000	20,215 11	15,146 00
G02602103 AMDOCS LTD	115 000	6,675.12	7,673 00
G16962105 BUNGE LIMITED	80 000	4,689 11	5,915.00
H1467J104 CHUBB LTD	107 000	12,645 90	14,634 00
H84989104 TE CONNECTIVITY LTD	95 000	6,175 38	9,491 00
Total Other Investments		6,167,303.59	7,498,555.00



Investing

in Community Well-being

Strengthening

Hawaii's Communities

Learning

for Greater Impact

Grants & Scholarships

for Community Causes & Students



Investing

Community Well-being

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Hawaii's Communities

Learning

for Greater Impact

Grants & Scholarships

for Community Causes & Students

HAWAII COMMUNITY FOUNDATION GRANTS & SCHOLARSHIPS



The Hawaii Community Foundation is honored to provide a wealth of financial support to qualified students and nonprofit organizations throughout Hawaii.

HCF invests charitable funds in communities across the State primarily through nonprofit organizations. Our core programs are designed to support a stronger nonprofit sector as we believe that these organizations are one cornerstone of a vibrant civil society. We administer a number of grant-making programs with targeted purposes or area-based focus. We create grant programs that deliver solid results efficiently while informing our impact work and knowledge assets.

HCF also assists several private foundations in delivering their grant-making programs according to their specific strategies. Each competitive grant program has its own funding priorities and proposal requirements. Our goal is to provide effective, efficient, timely, and fiscally responsible services to our clients and constituents.

In addition, we are proud to have awarded millions of scholarship dollars to worthy college students. We awarded our first student scholarships generations ago and will for generations to come. Our section on scholarships provides information on the necessary requirements for scholarship application.

We constantly commit ourselves to making sure our actions and investments are making a difference every day for the people and communities of Hawaii.

HOW TO APPLY FOR
A GRANT

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GRANT FAQs

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APPLY FOR A
SCHOLARSHIP

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SCHOLARSHIP FAQs

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100% of the net assets of the trust are held in the form of cash and cash equivalents

HAWAII COMMUNITY FOUNDATION



Oahu
827 Fort Street Mall Honolulu HI 96813
(808) 537-6333
Direct: 808-537-6333

Kauai
4139 Hardy Street Suite C
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(808) 245-4585

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HAWAI'I COMMUNITY FOUNDATION

Amplify the Power of Giving

(<http://www.hawaiicomunityfoundation.org/scholarships/how-to-apply-for-scholarships>)

Scholarship Manager

Welcome to Hawai'i Community Foundation's online scholarship application. We recommend the following browsers to access our application (e.g. Internet Explorer version 8 and higher; Mozilla Firefox; or Google Chrome). Mac users who use SAFARI browser may experience technical issues since it is not compatible with our system. □

RETURNING USERS: You will be asked for your username and the password you entered when you first created your account. □

If you forgot your *username* and/or *password*, DO NOT create a new account. Instead, please continue to the Log in Here page below, and click on the "Forgot your username?" or "Forgot your password?" and follow the prompts. □

If you have been *locked out* of your account, please contact us at 808-566-5570, or at scholarships@hcf-hawaii.org (mailto:scholarships@hcf-hawaii.org), and we will be happy to assist you.

Log in Here (https://hcf.scholarships.ngwebsolutions.com/scholarx_studentportal.aspx) □

First Time Users: You will be asked to create an account in order to access the scholarship application.

Create Account (https://hcf.scholarships.ngwebsolutions.com/ChameleonSMS/Chm_CreateAccount.aspx) □

QUICK LINKS

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Financial Goals Calculator

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(<http://www.hawaiicomunityfoundation.org/scholarships/how-to-apply-for-scholarships>)



Investing

in Community Development

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for Community Causes & Students

GRANTS & SCHOLARSHIP PSF SCHOLARSHIP FAQs



*HCF's 2018-2019 Common Application is now **CLOSED**.*

HOW TO APPLY

1. All applications are processed online.
2. Here is a checklist of steps for completing your online application (A-D):
 - A. Login to our secure website:
 - **Returning Users** □
If you already have an existing account, log in with your username and password entered when you first created your account. DO NOT create a new account if you forgot your username and/or password, or are locked out. Instead, please refer to the instructions in the related FAQ's below.
 - **First Time Users** □
Please create an account. Keep in mind that the email you use to create your account will be the email where all notices will be sent, including award notifications.
 - B. Complete the required Personal Statements (Part I and Part II) within the Common Application:
 1. **Personal Statement Part I** asks you to answer the following questions in 500 words or less:
 - What are your reasons for attending college?
 - Why did you choose your course of study?
 - What are your career goals?
 2. **Personal Statement Part II** asks "How have and/or how will you give back to Hawaii?" and should be answered in 600 words or less.
 - C. Gather the following required materials to upload to your application:

- Get your Student Aid Report (SAR), by applying for your Free Application for Federal Student Aid (FAFSA). According to the FAFSA website, typically, you will be able to access your SAR within two weeks of filing your FAFSA.
- Most Recent Grade Transcript as printed and issued by your school's registrar's office. For continuing college students, you must report your last semester grades and information must be included. Check with your school's registrar's office for processing time to ensure you are able to upload your transcript to your FAFSA application before the deadline.
- Short essays and/or other documents may be required for specific scholarships. Refer to our FAQs below to find out more about these optional essays and documents. While these uploads are marked as optional in the application, we encourage you to complete all that may be applicable to you.

D. Submit your application by the deadline date and time:

- For your records, you will receive an email notification from the webmaster when you successfully submit your application. We highly recommend you submit your application early as web server traffic increases around that deadline time, causing users to experience connectivity problems and submission errors. For more information on the above, continue to read through all of our FAQs.

ACCOUNT INFORMATION

What should I do if I forgot my User Name and/or Password?

Do not create another account if you have forgotten your User name or password associated with your existing account. Forgotten usernames and passwords can be accessed or reset accordingly by clicking on the links on the login homepage. Or, click on the appropriate shortcut link below:

• [Forgot my Username](#)

• [Forgot my Password](#)

In both instances, you will be required to submit your email address registered with your account.

I logged in incorrectly too many times and am now locked out of my account

We can help to unlock your account by sending us an email to info@hawaii.edu. For verification purposes, the email should include your full name, email address your account is registered under, along with a brief description of how we can assist you. Or you may contact us via our Scholarships Hotline at (808) 566-5570 during our normal business hours: Monday-Friday 8am-5pm.

Can I change my username or email associated with my existing account?

Yes, once you successfully login using your current account information, you may click on your account settings to update your username and/or email associated with your account again. Any notifications from us, including award notifications, will be sent to your email address associated with that account.

APPLICATION DETAILS

What are the basic eligibility criteria?

Each scholarship has specific eligibility criteria defined by the donor when the fund is established. General criteria that apply to most scholarships include:

- Be a resident of the State of Hawaii.
- Demonstrate financial need.
- Attend an accredited two or four year not-for-profit institution within the United States as either an undergraduate or graduate student.
- Be a full-time student as determined by your institution.
- Maintain a minimum 2.7 GPA (unless otherwise stated).

How do I obtain my Student Aid Report (SAR)?

Your SAR will be sent to you after your Free Application for Federal Student Aid (FAFSA) has been processed. Beginning October 1st, you can start your FAFSA for the following academic year by going to

For more information regarding the FAFSA process, please visit the FAFSA help website at fafsa.ed.gov.

What information needs to be on my uploaded Student Aid Report (SAR)?

Your uploaded SAR must include full pages of your processed report including your full name and Estimated Family Contribution (EFC) number for that Common Aid education year. If you are applying for the 2017-18 Common Aid education year, you must submit your 2017-18 SAR. Do not upload screenshots.

Some examples of SAR's that will be deemed invalid are as follows:

- FAFSA Summary Report: the report you receive immediately upon submitting your FAFSA
- SAR does not match the academic level of which you are applying
- SAR states that there is missing or incorrect information submitted on your FAFSA which needs to be corrected or addressed
- Name listed on your SAR does not match the name on your HCF Scholarship application
- Name and EFC do not be clearly read
- SAR does not include all pages
- Attached file format cannot be opened upon review by HCF and/or its decision committee members

NOTE: The validity of your SAR is up to the discretion of HCF's Scholarship staff. Any SARs under suspicion of doctoring or cheating will be eliminated from review and the applicant will not be considered for awards.

What information needs to be on my uploaded Grade Transcript?

You must upload your most recent grade transcript printed and issued by your school's Registrar's office. Your grade transcript should include the following:

- Student's name and logo
- Student's full name
- Course history
- Grades for each course or class/term results as follows:
 - Continuing College Students - Fall semester grades and information must be included in your transcript
 - High School Seniors - You will only need your senior year grades unless you are a transfer student
- Student cumulative Grade Point Average (GPA)

Some examples of grade transcripts which will be deemed invalid are as follows:

- Online transcripts or grade reports: HCF WILL NOT accept transcripts printed through an online student school portal such as the University of Hawaii STAR system. Again, all transcripts must be printed and issued by your Registrar's office
- Grade Transcript does not have your most recent academic history
- Name on your Grade Transcript does not match the name on your HCF application
- Grade Transcript cannot be clearly read
- Grade Transcript does not include all pages
- Attached file format cannot be opened upon review by HCF and/or its decision committee members

NOTE: The validity of your Grade Transcript is up to the discretion of HCF's Scholarship staff. Any transcript under suspicion of doctoring or cheating will be eliminated from review and the applicant will not be considered for awards.

What cumulative GPA do I use if I have a GED or am in a pass/fail graduate program?

If you have a GED or equivalent enter "3.85" into the cumulative GPA question in the application. If you are in a pass/fail program which does not issue grades on a graded scale, please enter "9.99" into the cumulative GPA box. These instructions are also listed in the application.

What should I include in my required Personal Statements?

There are specific questions asked in both Part I and Part II of the Personal Statement section. While you are not limited to answering these questions, at minimum they must be addressed in your essays, and should adhere to the maximum word count.

1. Personal Statement Part I asks you to answer the following questions in 500 words or less:

- What are your reasons for attending college?
- Why did you choose your course of study?
- What are your career goals?

2. Personal Statement Part II asks "How do you plan to give back to Hawaii?" and should be answered in 600 words or less.

We encourage you to include personal stories or examples in these essays which can support your answers to the required questions and give the reader a good sense of who you are. We also suggest you proofread your essays for any grammatical or spelling errors. Keep in mind that not only is the HCF staff reviewing your essays, but also the awarded scholarshipists, as well as donors who establish these scholarships.

Tip: Compose your essays in a word document (preferred) and then copy and paste them into your application to avoid the system timing out after thirty (30) minutes.

Do I need to submit Letters of Recommendation (LOR)?

No, however, there are a number of scholarships which require applicants to submit one or more LOR. Therefore, to be considered for the most amount of scholarships, we highly encourage you to request at least two (2) LOR. To determine whether a particular scholarship requires a LOR, please search through our scholarships on the Scholarship Manager home page.

How are Letters of Recommendation submitted with my application?

In the Letter of Recommendation (LOR) section of the application, enter your recommenders' name and email address. Our system will immediately generate an email informing your recommender of your request with a link to a form to be completed and submitted. You have the ability to request and monitor recommendations from up to three different people. All LORs must be submitted by the applicant deadline in order for them to be considered part of your application. We suggest you contact your potential recommender prior to sending the request to confirm their participation as well as their availability to submit their LOR by the application deadline.

Once you have chosen your recommenders, inform them that they will be receiving an email from notify@ngwecolutions.com. This is the source that sends out the request when you enter your recommender's email address on your scholarship application. Also, inform your recommenders to check their spam/junk mail folder daily for emails from this source. The recommender should be able to address your academic performance, leadership capabilities, or community service involvement.

At any time, you may view the status of your recommendations by logging into your account. You will also have the ability to send reminder emails needed by clicking on the Send Reminder Email option next to your recommender's name.

Some examples of suggested recommenders are:

- Your previous or current academic instructor, school counselor, club advisor, coach, employer, and/or church leader.

Some examples of invalid Letters of Recommendation are as follows:

- Letters from parents, friends, and relatives.
- Paper on and copies of letters sent or delivered to HCF.
- Attached file format is unable to be opened upon review by HCF staff or decision makers.

NOTE: The validity of a submitted letter of recommendation is up to the discretion of HCF's Scholarship staff. Any letters under suspicion of forgery, doctoring, or editing will be eliminated from review and the applicant will not be considered for awards.

Can I change my recommender after an initial request has been sent?

Yes, you may withdraw a request to a previous recommender(s) and send a request to a new recommender by logging in to your account prior to the application deadline. Click on the withdraw option next to your recommender's data, then enter your new recommender's information.

Do I need to attach any other document(s) besides my SAR and Grade Transcript in order to submit my application?

No documents besides the SAR and Grade Transcript are required to submit your application; however, additional documents may be needed to qualify for specific scholarships. Examples of additional documents may include letters of recommendation, birth certificates, SAT/ACT scores for high school seniors, verification of organizational affiliations, etc. If you do qualify for a scholarship which has an additional document requirement, a section to upload (or request for LORs) that additional document will appear within your application file. Examine the comments you search through our scholarships to determine what additional documents may be required for those particular opportunities. All additional documents must be uploaded and submitted with your online application. We will not accept hard or email copies of any documents.

NOTE: The validity of any documentation submitted is up to the discretion of HCF's Scholarship staff. Any documents under suspicion of forgery, doctoring, or editing will be eliminated from review and the applicant will not be considered for awards.

Do I need to answer the additional essays or short answers in order to submit my application?

No. Short essays and/or answers may be required for specific scholarships, but are not required to submit your application. Please use the Search Scholarships feature on the application homepage to determine if an additional essay/short may be required to be eligible for a specific scholarship.

How do I know whether an answer, attachment, or essay is a required section in order to submit my application?

All required answers or attachments are indicated with a red asterisk next to that section or question. In addition to this, the system will prompt you with an error message if you try to submit your application without filling out a required answer or section. Thus, you should carefully review your application prior to submission and wait as submitting your application in advance of the deadline to correct any missing required answers.

If I am currently in college, do I still need to upload my ACT and/or SAT scores?

No. If you are currently enrolled and attending college, you do not need to attach your ACT or SAT scores. This is an optional document for current high school seniors only.

What if I don't have a scanner to scan and upload my support documents?

You may want to seek assistance from a relative, friend, working professional, or counselor, who may have access to a scanner. You can also utilize websites such as Kinko's, which can assist you for a fee. Alternatively, if you're not sure, we recommend that you format your files for print into a PDF format before attaching them to your application. You may want to download a free PDF converter on your computer to convert documents into a PDF format. Recommended websites are www.pdfcrowd.com or www.pdfcrowd.com.

How can I upload or attach multiple pages to my application?

You can create and upload a zip folder by right-clicking a blank area on the desktop or in an open folder. Then point to New and click Compressed (zipped) Folder and drag your files into the zip folder. Upload the zip folder to the application.

Can I mail my supporting documents?

No. Everything must be submitted online. We recommend that you start early, gather the necessary tax documents to fill out the FAFSA when it becomes available, and request a copy of your transcript from your registrar's office once your applicable semester is completed. On the application, only be submitted once all required support documents have been uploaded.

How much time will it take to complete the online application?

It will take approximately 2-3 hours to fill out the application. Your application session will time out after 30 minutes of inactivity, but will regenerate if you use the save function. You may save your application and return to it at any time prior to the deadline date.

Is there any cost to apply for any scholarships?

No, the HCF application that accesses 200+ scholarships is a free application.

Can I make changes to my application after it has been submitted?

Once your application has been submitted, the only changes that can be made is to your recommenders. You can not edit any other part of your application, so you should review all your information before submitting.

AWARD INFORMATION

When will I be notified of my award status?

You will be notified online after the selection committees meet, which may be any time between April and July.

How will I know if I am awarded a scholarship?

An award will be posted to a student's account online, which can be viewed at any time between April and July by simply logging into their account. A courtesy email notification will also be sent to the email address registered with that account. With over 3,000 applicants each year, the awarding process is extremely competitive and not all applicants may receive an award, however, we encourage you to apply every year.

What do I do if I received an award notification?

Once awarded, there is a two-step process that needs to be completed in order for HCF to send your award payment to your school.

1. Login to your account and accept or decline each award. To do so, click on the Award Information tab on your student home page and select the accept button next to the scholarship(s) listed.
2. Complete and submit the Student Award Acceptance Form (SAAF) to confirm your academic plans. The email notification you received, as well as the award message online will contain a link to the SAAF. We highly recommend that you complete your SAAF within 2 weeks of receiving your award notification. NOTE: Any changes to your original academic plans must be reflected in your SAAF. However, this may affect your final eligibility and/or award amount. Your SAAF will be verified against the requirements of the scholarship(s) you were awarded and if any changes to the awarded amount occurs, we will send you an email.
3. (Optional) Write a Thank You letter to the donor. Thank you notes are highly encouraged but not required. Donors enjoy reading thank you notes and they would like to know something about the person who is receiving their scholarship. If you were fortunate to have received a scholarship from a fund through Hawaii Community Foundation, address a thank you note to 'Scholarship Committee' and mail it to: Hawaii Community Foundation - Scholarships 927 Fort Street Mall Honolulu, HI 96813.

If I already filled out my SAAF but receive another award after, do I need to do another SAAF?

No. Once you have completed your SAAF, the answers you submitted on the form will be applied to all awards you receive within the same academic year.

What if I already submitted my SAAF but my academic plans have changed?

Contact us as soon as possible to inform us of any changes to your SAAF. If your check has not been processed, we will work with you to edit your SAAF as applicable. However, if your award check has already been processed, please send a , email to us at info@hcf.org with the following information:

- Your full name
- The change to be made to your SAAF (e.g. enrolling in a different school, change of part-time or full-time status, or change of major)
- Reason for the change Any changes to your SAAF may cause a delay in issuing you a new award payment, or it may eliminate you from being eligible for your awards altogether, based on the scholarship criteria.

What if I do not want to accept my award or I will not be attending school for the awarded academic year?

We understand that circumstances may change between the time you submit your application to when our awarding begins. If you receive an award notification and do not wish to accept your award, please login to your account and click the Decline award option. We ask that you do this as soon as possible as this may allow us to award another deserving student.

What will my scholarship award cover?

The scholarship can be used for any educational expenses related to your school's cost of attendance, which

may include tuition and fees, books and supplies, room and board, and other miscellaneous school expenses for the awarded academic year.

If I receive a scholarship one year, will I automatically receive an award for the following year?

No. Students must complete the application process again in order to be considered for a scholarship award the following year. Some scholarship funds are committed renewals and others may give preference to returning applicants.

When will I receive the scholarship money?

You will receive your award after you have accepted your award online and your completed Student Award Acceptance Form has been submitted and verified. Scholarships are paid to the school you are attending usually in two payments: one in August for the fall semester and one in December for the spring semester. Once awarded, the money you receive each award and submit the Student Award Acceptance Form to let us know which school you will attend in the fall.

Are the scholarships awarded sufficient to pay the cost of my college education?

No. These scholarships are intended to provide only partial support. In addition to applying for scholarships through the Hawaii Community Foundation, you should look into other financial aid resources such as federal grants, loans and work-study awards. A complete financial aid package can be put together by your college's financial aid office and may include various types of financial aid.

How much will I receive in scholarships from HCF?

HCF Scholarship funds offers varying award amounts which generally range from \$1,000 to several thousand dollars depending on the size of each scholarship fund, the number of qualified applicants and directions given by the donors. Donors are encouraged to complete the application as thoroughly as possible, i.e. answer as many questions that are applicable, provide essays as requested, in order to increase their chances of being eligible for multiple scholarship opportunities. The average award to students is approximately \$2,500.

GENERAL FAQ'S

What are the recommended browser requirements?

We list Explorer version 8 and higher, Mozilla Firefox, Google Chrome. Apple users who use Safari may experience technical issues.

Do I need to select the scholarships for which I want to apply?

No. You will automatically match your application to all the scholarships for which you may be eligible once you complete the application in WebApp for committee review. Remember, some scholarships require answers to additional questions or online track has measure to complete the entire application to increase your chances of eligibility for as many scholarships as possible. You may search scholarships for specific eligibility criteria and required documentation, but will not be able to select specific scholarships to apply for.

My school is not listed in the institution drop down list. How can I add it?

If your school is not listed, please send an email to info@hcf.org with your name and include the full legal name of your school as well as their mailing address. Allow up to three (3) business days for the Scholarship team to respond and process your request.

I have a double major. Can I add a second major to my scholarship application?

No. The HCF application allows you to select only one major. Take the time to review the available scholarships for both majors using the Category Search function to determine which scholarships would be most beneficial to your selected major.

How is my financial aid determined and who is responsible for making that determination?

The federal government determines your Expected Family Contribution (EFC) based on information obtained through your FAFSA. The Cost of Attendance (COA) calculated by individual institutions, is an estimate which includes tuition, fees, room and board, books, supplies, transportation and personal expenses. HCF calculate financial need by subtracting your EFC from your COA. In other words, COA minus EFC equals Financial Need.

How do you select scholarship recipients?

Committees made up of various community individuals makes recommendations for awarding based upon the specific purpose and criteria of each scholarship fund as established by the donor.

How do I start or contribute to a HCF Scholarship Fund?

The cost of college is on the rise, and students need our help more than ever to achieve their goal of college completion. Please consider making a contribution to a scholarship fund today. Contact us directly at (808) 537-6333, or at info@hawaiicommunityfoundation.org

HAWAII COMMUNITY FOUNDATION

Oahu

827 Fort Street Mall Honolulu, HI 96813
(808) 537-6333

www.hawaiicommunityfoundation.org

Kauai

4139 Hardy Street Suite C
Lihue, Hawaii 96766
(808) 245-4585

Hawaii Island

Waimea Office
65-1279 Kawaihae Road Parker Square #203
Kamuela, Hawaii 96743
(808) 885-2174

Mau

33 Lono Avenue, The Kahului Building Suite 390
Kahului, Hawaii 96732
(808) 242-6184

Hilo Office

117 Keawe Street Suite 108
Hilo, HI 96720
(808) 935-1206



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HAWAII COMMUNITY FOUNDATION

Amplify the Power of Giving

(<http://www.hawaiicommunityfoundation.org/scholarships/how-to-apply-for-scholarships>)

Scholarship Search

Use the options below to determine your search criteria. Please note that you can search three different ways. □

- Category Search - Scholarships are assigned categories by your schools. This option allows you to identify and search the categories that you feel are most relevant to you.
- Keyword(s) Search - Your school may assign a keyword to a scholarship. This option allows you to search that keyword field.
- Description and Name Search - You can simply search the description or name of scholarships to see if they contain words that you might deem suitable (e.g. Biology).

☐ Apply Now □

Your Selections

[Clear All \(https://hcf.scholarships.ngwebsolutions.com/ScholarX_ScholarshipSearch.aspx?clear=Y\)](https://hcf.scholarships.ngwebsolutions.com/ScholarX_ScholarshipSearch.aspx?clear=Y)

Keyword □

MARION

Keyword (s) MARION

Scholarships 1

Marion Maccarrell Scott Scholarship □

Gertrude F. Straub established this scholarship as a memorial to her father, M. M. Scott, who for many years was a teacher and principal in Hawai'i's public school system. The scholarship benefits students from public high schools in Hawai'i, planning to attend college on the mainland and who demonstrate a commitment to world peace. □

Requirements.

- Be a graduate of a public high school in Hawai'i
- Attend an accredited, not-for-profit U.S. mainland college or university.
- Minimum GPA 2.8
- Be enrolled Full-Time.
- In addition to your personal statement, write an essay in the box indicated on the application describing your commitment to world peace and discuss how your learning experiences may lead to international understanding.

□

QUICK LINKS

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OUR STORIES

Our 100 Years
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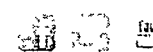
USEFUL TOOLS

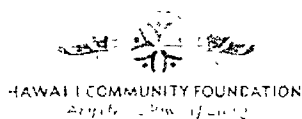
How to Apply for a Scholarship
How to Donate
Is a Gift Tax Deduction
How to Get a Scholarship

STATEWIDE OFFICES

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Maui Office
Kauai Office
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Investing

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Learning

Grants & Scholarships

Community Development Grants, Community Development Grants, for Greater Impact, for Community Causes & Students

TRAVEL SCHOLARSHIP APPLICATION



For Neighbors and Nonprofit Organizations

Hawaii Community Foundation (HCF) is pleased to offer a limited number of travel scholarships for neighbors and nonprofit organizations to increase access and utilization of professional development training that will support organizational capacity. These funds are intended to defray travel costs and may be used for airfare, expenses for non-profit employees or board members related to attending training sessions, conferences and educational programs on Oahu or another neighbor island location. Scholarships must be approved by HCF. Travel to travel scholarship funds are limited to the purchase of airline tickets only – reimbursement for other travel costs.

To be eligible, the participant's organization must meet the following requirements

- The organization is a nonprofit 501(c)(3)
- Maximum of one scholarship per person per year will be awarded
- Maximum of two scholarships per organization per year will be awarded

To apply for a scholarship

- If funding is granted you will be required to email a copy of the invoice or receipt indicating the cost of your travel tickets as well as proof of registration to the workshop or conference. Please send these items to your HCF field office via the email address below.

- A check will be issued payable to the organization, not an individual, within one month of invoice receipt.

If you have any questions please email your local representative.

- Hawaii Island

Chelsea Chong

808-566-5545

hawaii@hawaii-foundation.org

- Maui County

Hannah Ventura

808-242-6184

1011 1/15

* Name send

1011 1/15

808-242-6184

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Enter Your Application Information Below

* Organization

Name

Address

City

* State



* Island



* Zip Code

Website

* Attendees Name

Title

* Email Address

* Years at

Organization

* Conference,

Program or Training

* Location of

Conference,

Program or Training

* Date

* What do you

hope to gain by

attending the

conference,

program or training

session?

* How will you use

the knowledge you

acquire?

SUBMIT

HAWAII COMMUNITY FOUNDATION

Oahu

827 Fort Street Mall Honolulu HI 96813
(808) 537-6333

Kauai

4139 Hardy Street Suite C
Lihue Hawaii 96766
(808) 245-4585

Hawaii Island

Waimea Office
65-1279 Kawaihae Road Parker Square #203
Kamuela Hawaii 96743
(808) 885-2174

Mau

33 Lono Avenue The Kahului Building Suite 390
Kahului Hawaii 96732
(808) 242-6184

Hilo Office

117 Keawe Street, Suite 108
Hilo HI 96720
(808) 935-1206



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