



Housekeeping Tips

- Please mute your mic when logging in
- Please update your name
 - This ensures that we know you're in attendance
 - Especially if you are calling from your phone
- Cameras do not need to be turned on
- Use Q&A to ask questions, as they'll be lost in the chat
- Presentation is recorded and will be sent to everyone



Welcome, Cohort 5!

2026 Costco Scholars

COLLEGE
SUCCESS
FOUNDATION

Today's Presenters



Kerrie Moss

Program Officer, Scholarships
& Financial Aid Education



Maria Rebecchi

Director, Scholarships &
Financial Aid Education



Agenda for today

1. CSF Mission
2. Costco Employee Scholarship
3. Maintaining Eligibility
4. Updating Your Information
5. Q & A

Our Mission



College Success Foundation coaches and supports students from low socioeconomic backgrounds to prepare for and graduate from college as transformational leaders in order to forge a just and equitable society.

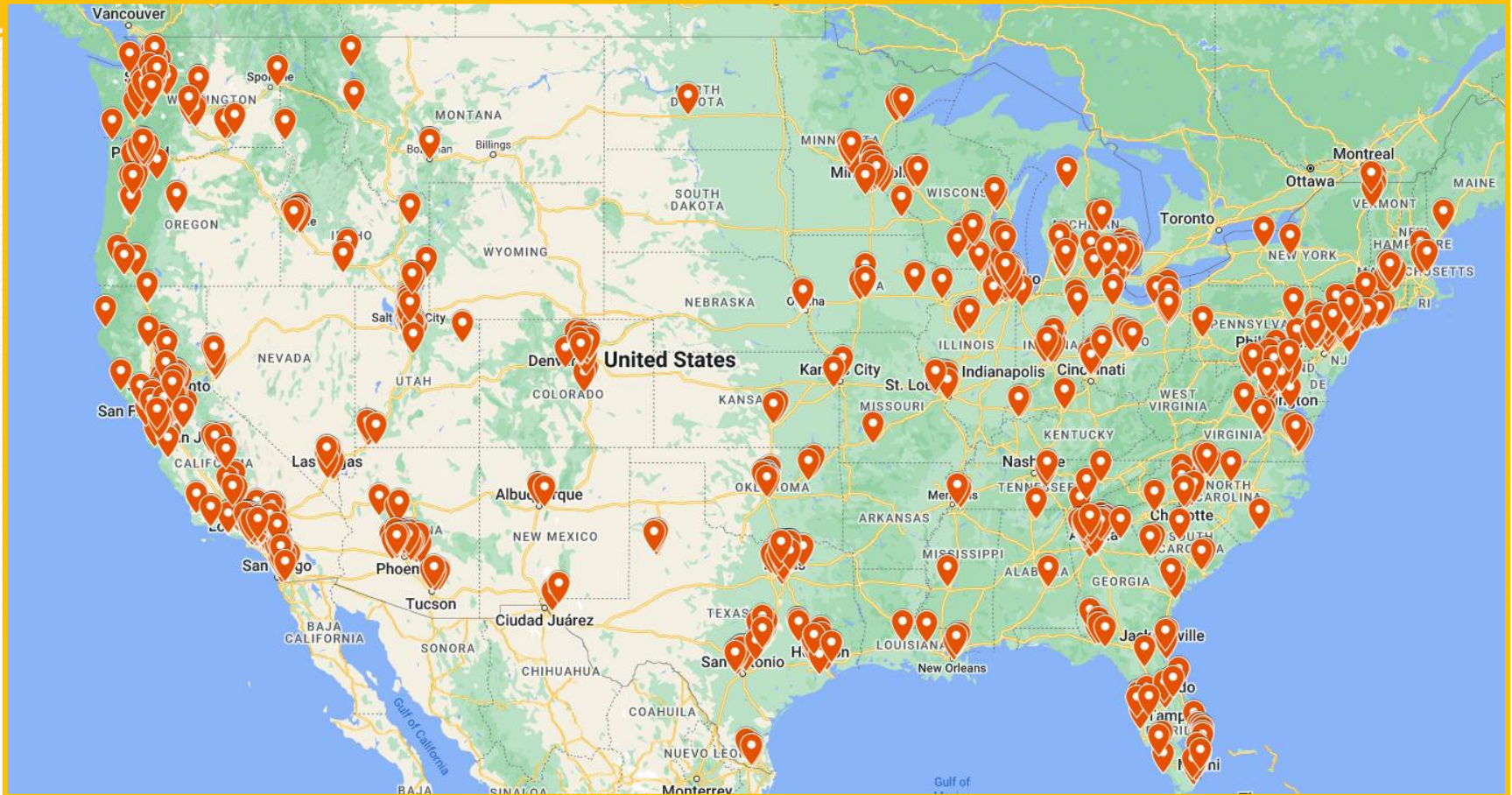


Costco Employee Scholarship Program

Costco Wholesale launched a new scholarship program for its employees in 2021. The Costco Employee Scholarship is open to regular full- and part-time and limited part-time permanent Costco Wholesale Employee residing in the United States or Puerto Rico. College Retention and limited part-time employees are also eligible.

This scholarship is available in amounts up to \$2,500 per academic year for up to four years or allocated over a maximum of six years. Applicants must be enrolled or planning to enroll in a nonprofit, accredited U.S. college or university.

Where do Costco Scholars live?



The Basics



- Up to \$2,500 per year to attend 2 or 4-year colleges
- Awarded for 4 years, OR until you obtain a bachelor's degree *or certificate* OR allocated over a maximum of 6 years
- If eligible for 4 years, you receive \$2,500 each year, totaling \$10,000
- Must be enrolled **part-time or full time** (12+ credits) each term
- If less than 12 credits per term we prorate the amount (example: 6 credits fall semester = \$625, 6 credits spring semester= \$625)
- "Leftover funds" do not roll over if you do not use them in one year
- Can't be used for graduate degrees
- Funds can be used for tuition, fees, housing, food, books, transportation, and personal expenses as detailed in the cost of attendance.

The Basics



- We encourage you to file FAFSA every year as soon as it opens. Also check your state's financial aid application. This is not a requirement.
- Must maintain Satisfactory Academic Progress (SAP) measures at your school
- Be a part-time, limited part time or full-time, permanent Costco Wholesale Employee who resides in the United States, or in the College Retention program

2026-27 Academic Year Disbursement Schedule



| School Term | Date funds will be sent |
|-----------------|-------------------------|
| Fall Semester | 7/22/2026 |
| Fall Quarter | 7/22/2026 |
| Winter Quarter | 11/11/2026 |
| Spring Semester | 11/11/2026 |
| Spring Quarter | 2/24/2027 |
| Summer Term | 4/21/2027 |

Timeline & Processing



- Disbursement payments may be mailed to FA offices OR transferred electronically to business office
- Two weeks processing time minimum
- Intersessions & Summer: **Must make a special request**
- Reasons why your scholarship is not disbursed:
 - Not enrolled full-time or part-time
 - Change of school
 - Not meeting SAP
 - Renewal not completed
 - Incorrect mailing address
 - Didn't enroll in prior terms



Timeline & Processing

IF YOU DON'T ENROLL AND WE ONLY FIND OUT BECAUSE YOUR SCHOOL RETURNS YOUR FUNDS, WE WILL NOT DISBURSE ANY ADDITIONAL FUNDS UNTIL WE HEAR FROM YOU.

Enrollment & SAP



- Enrollment –
 - Must be enrolled part time (6+) or full time (12+) each term
 - Contact us if you will not be enrolled full time BEFORE your funds are disbursed
 - Make sure to review disbursement email sent to you prior to issuing payment
- Satisfactory Academic Progress (SAP)
 - Must meet college's SAP policy
 - Not meeting SAP = No scholarship

Scholarship Renewal Information

May 1 - June 30




- Must renew every year by June 30th.
- First renewal must be submitted by June 30, 2027. The renewal/end of year form is available starting on May 1, 2027.
- We will send you an email with instructions by mid-April 2027.
- Please do not complete a new scholarship application
- You complete the renewal/end of year form on our scholarship platform: Formstack
- You will upload unofficial transcripts and a thank you note
- Graduating scholars and scholars declining the scholarship must also complete the renewal/ end of year form

Disbursement Timeline & Amount

| SEMESTERS | 1st Disbursement Fall Semester | 2nd Disbursement Spring Semester | Summer Term (let us know before August if you want funds split into 3 terms) |
|---|-----------------------------------|-------------------------------------|---|
| Date | July 22, 2026 | November 11, 2026 | April 21, 2027 |
| Amount <i>(Assuming you take 12 credits each term)</i> | \$1,250 | \$1,250 | |

| QUARTERS | 1st Disbursement Fall quarter | 2nd Disbursement Winter Quarter | 3rd Disbursement Spring quarter | Summer Quarter (let us know if you want us to split funds into 4 terms) |
|--|----------------------------------|------------------------------------|------------------------------------|--|
| Date | July 22, 2026 | November 11, 2026 | February 24, 2027 | April 21, 2027 |
| Amount <i>(assuming 12 credits per quarter)</i> | \$834 | \$833 | \$833 | |

Scholarship Adjustments/Proration



| # of Credits | Scholarship Amount in percentages | Semesters | Quarters |
|--|-----------------------------------|---------------|-------------------|
| 12+ credits (full-time) | 100% | \$1250/\$1250 | \$834/\$833/\$833 |
| 9-11 credits (Three quarter time) | 75% | \$937/\$937 | \$625/\$625/\$625 |
| 6-8 credits (half-time) | 50% | \$625/\$625 | \$417/\$417/\$417 |
| 5 credits or less *students need to take a minimum of 3 credits | 25% | \$312/\$312 | \$209/\$209/\$209 |

Updating Your Information

Please make sure to let us know if anything changes



ScholarshipServices@collegesuccessfoundation.org

- Change of address, phone number, email
- Award adjustments (taking less than 12 credits)
- Transferring Colleges*
 - Need to know the college, student ID, and term transferring
 - Must work with college to process new financial aid award

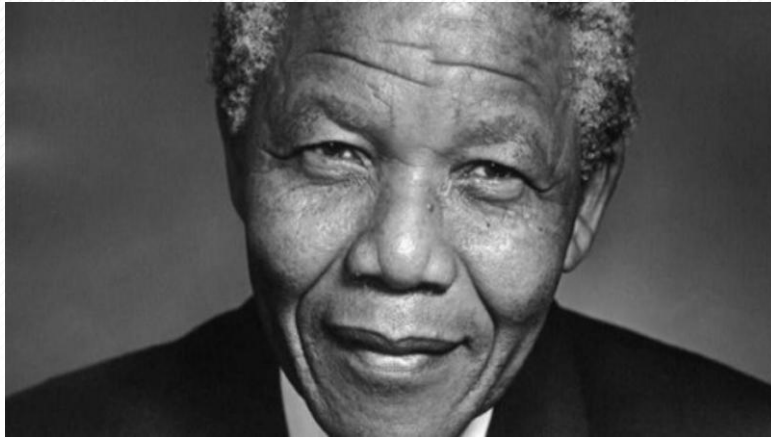


We are here to help!

The best way to reach us and the fastest way to get a response:

ScholarshipServices@collegesuccessfoundation.org

Farewell



“Education is the most powerful weapon we can use to change the world.”

— Nelson Mandela



Q & A

Thank you!

ScholarshipServices@collegesuccessfoundation.org