

R. J. MCELROY TRUST
2006 - 2007
Student Loan Fund Annual Report

Please complete this form and return by October 1, 2007 to: The R. J. McElroy Trust, 425 E. Cedar Street, Suite 312, Waterloo, IA 50701. Please enclose copies of the minutes of the Loan Fund Trustees' meetings. If this year's 990 has been filed please enclose a copy, if it has not been filed, please mail a copy when it is available. If you have any questions, please call Stacy Van Gorp at (319)287-9102.

1) Total Amount Loaned in '06-'07 \$ _____
Total Repaid by Recipients in '06-'07 \$ _____
Total Loans Outstanding as of _____ (Date) \$ _____ +
Bad Debt Reserve \$ _____ +
Total Cash/Investment as of _____ (Date) \$ _____ = =====
Total Fund Balance as of _____ (Date) \$ _____

- 2) Please list those persons currently serving as Trustees for the Loan Fund:
- 3) During the past year have any changes been made in the policies of the Loan Fund?
(i.e.: required recipient criteria, interest rates, etc.)
- 4) During the past year have any changes been made in the implementation of the Loan Fund? (i.e.: recipient selection process, publicizing of program, forms used, etc.)
- 5) What has your experience been with student repayments of loans?
- 6). Please attach a list of the '06-'07 Loan Fund Recipients with amounts loaned.
- 7) Do you have any suggestions as to how the McElroy Trust might improve the program? If so, please list on the back of this form.

College: _____ Date: _____

Signature: _____ Name: _____
Printed

Telephone #: _____ E-mail: _____