

Post Secondary Institution Student Bursary

David Sale FCPA FCGA Award

Purpose

The CPAEF Education Foundation has established a bursary award to honour Mr. David Sale FCPA FCGA, a former board chair of the legacy CGA-BC Association and co-chair of the CPABC Joint Venture, in memory of his tremendous contribution to academia and the accounting profession.

The David Sale FCPA FCGA Bursary assists accounting students attending a BC post-secondary institution who have demonstrated financial need with bursaries of up to \$3,000 per annum.

Procedures

This form should be completed and submitted with a **recent transcript of marks**, a **copy of your most recent tax return assessment** and a **covering letter** to the CPA Education Foundation of BC, Attention: David Chiang, CPA, CA, Vice-President, Member Advice & Programs, 800-555 West Hastings Street, Vancouver, BC V6B 4N6.

The covering letter should explain your reason for requesting financial assistance, including any extenuating short- or long-term circumstances, and your career goals.

The CPAEF will review all the applications received and award monies to those applicant(s) who appear to be most in need and deserving.

Personal Information

Last Name: _____ First Name: _____ Student No. _____

Social Insurance Number _____ E-mail _____

Home Telephone _____ Business Telephone _____

Mailing Address _____

City _____ Province _____ Postal Code _____

What year of your program are you in? _____

Is it your intent to enter the accounting profession? _____

Please attach a letter of reference from an accounting instructor (from college or university).

Describe your work or community history.

Student Bursary application continued

Income Information

1) Revenue

Please provide the following amounts for this calendar year and the last calendar year. For the current calendar year, please estimate these amounts using your best judgment. This information should be provided for you personally, as well as on an aggregate basis for all members of your household (if common law or married).

	<i>Individual</i>		<i>Household</i>	
	<i>Current Year</i>	<i>Prior Year</i>	<i>Current Year</i>	<i>Prior Year</i>
Gross earnings (wages) from employment	\$ _____	\$ _____	\$ _____	\$ _____
Child support/alimony	\$ _____	\$ _____	\$ _____	\$ _____
Income Assistance (welfare) and/or income from the Disability Benefits Program	\$ _____	\$ _____	\$ _____	\$ _____
Employment Insurance benefits	\$ _____	\$ _____	\$ _____	\$ _____
Workers' Compensation Board benefits	\$ _____	\$ _____	\$ _____	\$ _____
Pension income	\$ _____	\$ _____	\$ _____	\$ _____
Child Care Subsidy from government sources or other agencies	\$ _____	\$ _____	\$ _____	\$ _____
Bursaries (include any bursaries received)	\$ _____	\$ _____	\$ _____	\$ _____
Scholarships or merit-based awards	\$ _____	\$ _____	\$ _____	\$ _____
All contributions from family members (including parents)	\$ _____	\$ _____	\$ _____	\$ _____
All other sources of income, including monetary gifts	\$ _____	\$ _____	\$ _____	\$ _____

Please specify: _____

During your study period, do you also have a full-time job? Yes No

Does your employer support your studies financially? Yes No

If yes, indicate the amount of reimbursement or expenses that are paid by your employer.

\$ _____

next...

Student Bursary application continued

Income Information continued

2) Expenses

	<i>Individual</i>		<i>Household</i>	
	<i>Current Year</i>	<i>Prior Year</i>	<i>Current Year</i>	<i>Prior Year</i>
Rent	\$ _____	\$ _____	\$ _____	\$ _____
Mortgage payments	\$ _____	\$ _____	\$ _____	\$ _____
Car payments	\$ _____	\$ _____	\$ _____	\$ _____
Total child care costs for your child(ren) age 18 and under	\$ _____	\$ _____	\$ _____	\$ _____
Child support/alimony you pay	\$ _____	\$ _____	\$ _____	\$ _____

While you are in school, will you be living with your parent(s)/step-parent/sponsor/legal guardian or living in

a home owned or rented by them?

Yes No

Other expenses (please describe):

3) Asset information

	<i>Individual</i>	<i>Household</i>
What is the net worth of all your term deposits, GICs, mutual funds, stocks, bonds, etc.?	\$ _____	\$ _____
What is the net worth of your RRSP/TFSA?	\$ _____	\$ _____
What is the net worth of any car/truck/motorcycle/other motor vehicle?	\$ _____	\$ _____
What is the net worth of other assets (such as any real estate)?	\$ _____	\$ _____

Other assets (please describe):

next...

Student Bursary application continued

Dependants

Do you have any dependants? Yes No

List dependants below:

Name	Relationship	Age (if over 18, explain why they are dependent on you)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Personal Goals

Outline your educational goals and describe your anticipated timetable to complete the program.

Explain your career goals upon completion of your program.

I hereby certify that the information given on this form and in any attached documents is true, correct and complete. I understand that if I do not provide complete, accurate information or if I obtain or attempt to access financial assistance by fraudulent means, I will be denied financial assistance now or in the future. I understand that if I receive money and then it is discovered that my application is not accurate, I will be required to repay all or part of the money, with interest.

Signature of Applicant

Date