

Student Bursary application

Purpose

The CPAEF Education Foundation has established a fund to assist the Preparatory Courses students who have successfully completed two (2) courses with CPA Western School of Business (CPAWSB) in the preceding year and CPA PEP students once they are registered in CPAWSB Core Module 1 or the MPAcc. program at the University of Saskatchewan. These bursaries are open to BC students who have financial need.

The covering letter should explain your reason for requesting financial assistance, including any extenuating short- or long-term circumstances, your career goals, and provide an estimate of the time you require to obtain your designation.

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

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 Services, 800-555 West Hastings Street, Vancouver, BC V6B 4N6.

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 the CPA program are you in? _____

When do you expect to finish the CPA program? _____

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

Describe your work history for the past five years (indicate employer, position, nature of duties and duration of employment).

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Have you ever received assistance from the CPAEF (or its legacy Educational Foundations) before? Provide a complete list of all Foundation Monies received, including dates and amounts.

Name all other organizations (including your employer, Canada Student Assistance Program, British Columbia Student Assistance Program, private corporation bursary or scholarship) that have or are providing you with funding to complete the CPA program. Include the amounts received or to be received and the date of each.

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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

	<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, will 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. \$ _____

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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):

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Dependants

Do you have any dependants? Yes No

List dependants below:

Name	Relationship	Age (if over 18, explain why they are dependent on you)
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Community Activities

Please list the organizations to which you currently belong and briefly describe the nature of your involvement. You may list your involvement in extra-curricular activities, including sports clubs, volunteer activities at schools/PSI.

Personal and Financial Goals

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

Explain your career goals upon completion of your CPA.

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Personal and Financial Goals continued

Describe how you have paid for your studies to date.

Briefly describe your financial plan to complete your studies. Include how you expect to fund your studies and living expenses.

If you will have any extraordinary expenses, please describe them in detail.

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