

CPA Student Financial Assistance Program application

SUBMITTED IN CONFIDENCE

Purpose

The CPA Education Foundation (CPA EF) has established a fund to assist students enrolled in CPA Atlantic School of Business (CPA ASB) programming with financial need. To be eligible you must be resident in Newfoundland and Labrador and enrolled in one of the following CPA ASB programs:

- CPA preparatory courses
- CPA Professional Education Program (CPA PEP)

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 cover letter addressed to the CPA Education Foundation of Newfoundland and Labrador, Attention: Jason Hillyard, CPA, CGA, 95 Bonaventure Ave, St. John's, NL, A1B 2X5 or by email to jhillyard@cpanl.ca.

The cover 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 CPA EF will review all the applications received and award funding to those applicants who appear to be most in need and deserving.

Personal Information

Last Name: _____ First Name: _____

Student #: _____ E-mail: _____

Home Telephone: _____ Business Telephone: _____

Mailing Address: _____

City: _____ Province: _____ Postal Code: _____

Student Financial Assistance Program application continued

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 CPA ASB).

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

Have you ever received assistance from the CPA EF before? Provide a complete list of all funding received, including dates and amounts.

Name all other organizations (including your employer, Canada Student Assistance Program, 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.

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

	Individual		Household	
	Current Yr	Prior Yr	Current Yr	Prior Yr
Gross earnings (wages) from employment				
Child support/alimony				
Income support 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				
Contributions from family (incl. parents)				
All other sources of income, including monetary gifts				
TOTAL				

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: _____

2) Expenses

	Individual		Household	
	Current Yr	Prior Yr	Current Yr	Prior Yr
Rent				
Mortgage Payments				
Car Payments				
Total child care costs for your child(ren)				
Child support/alimony you pay				
Other				
TOTAL				

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):



CHARTERED PROFESSIONAL ACCOUNTANTS'
EDUCATION FOUNDATION OF NEWFOUNDLAND AND LABRADOR, INC.

Income Information continued

3) Asset information

	Individual	Household
What is the net worth of all your term deposits, GICs, mutual funds, stocks, bonds, etc.?		
What is the net worth of other assets (such as vehicles, real estate, etc)?		
TOTAL		

Other assets (please describe):

Dependants

Do you have any dependants? ☐ Yes ☐ No

List dependants below:

Name	Relationship	Age (if over 18, explain why dependent)

Community Activities

Please list the organizations to which you currently belong and briefly describe the nature of your involvement.

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.

Describe how you have paid for your studies to date.

Briefly describe your financial plan to complete your CPA 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

Date