

Application for Financial Assistance



CPA

CHARTERED PROFESSIONAL ACCOUNTANTS
OF MANITOBA FOUNDATION INC.

1. Surname: _____ Given Name(s): _____
Name Commonly Used: _____
Mailing Address: _____
Phone: _____ Personal Email: _____
Employer Name: _____
Business Address: _____
Position/Title: _____
Business Phone: _____ Business Email: _____

Have you received support from the CPA Manitoba Foundation in the past? **Please note:** this will not reduce or change your chances of being accepted.

- ☐ Yes, I have received support from the Foundation in the past.
☐ No, I have not received support in the past.

Financial Assistance: The intent of financial assistance is to assist CPA candidates and students with their tuition, student dues payments or other barriers that limit educational success. It may also be used to cover other expenses including, but not limited to, transcript assessments, tutoring, private courses, travel assistance, child care, etc.

Criteria

- An Applicant must be a registered CPA PEP candidate or CPA preparatory student in good standing with the CPA Western School of Business at the application deadline.
- Applicants must have must achieved satisfactory performance in prerequisite studies, thereby demonstrating an aptitude for attaining the CPA designation.

Important Dates

The Foundation accepts applications four times per year as follows:

| | Spring | Summer | Fall | Winter |
|-----------------------------|---------|--------|-----------|------------|
| Application deadline | April 1 | July 1 | October 1 | February 1 |
| Date of decision | May | August | November | March |

Confidentiality

All information provided herein is kept in confidence to be reviewed by the Student Support Committee of the CPA Manitoba Foundation only.

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2. **Marital Status:** ☐ Married ☐ Single ☐ Separated

Do you have dependants? ☐ Yes ☐ No

If "Yes", how many? _____ Age(s)? _____

3. Academic:

- University degree(s) held? _____
- Name(s) of University _____
- Which program are you registered in?
 - ☐ CPA PEP
 - ☐ CPA preparatory courses
- What date did you first enroll in CPA PEP or CPA preparatory courses? _____
- If you are a CPA PEP candidate, in when do you expect to write the CFE (Month & Year)? _____
- If you are a CPA preparatory student, when do you expect to enter CPA PEP (Month & Year)? _____

4. Residence:

- ☐ Sole Rental Occupant
- ☐ Shared Rental Accommodation
- ☐ With Parents/Family/Friends
- ☐ Own Residence:
 - If residence owned, date purchased? _____
 - Amount outstanding? _____
- ☐ Other (specify) _____

5. Transportation: Current means of transportation?

- ☐ Own Vehicle
- ☐ Bus
- ☐ Other (specify) _____

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| | This Year (Jan - Dec) | Next Year (Jan - Dec) |
|------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 6. Resources: | | |
| Net salary after taxes (Attach copy of T4 slips.): | | |
| Travel allowance: | | |
| Interest dividends and other investment income (attach copies of T3, T4A and T5 slips.): | | |
| Canada Child Benefit: | | |
| Awards/bursaries received: | | |
| Employer financial support of tuition fees/dues: | | |
| Other income or resources of any kind | | |
| Savings: | | |
| Subtotal: | | |
| Spouse's or cohabiting partner's income or resources available: | | |
| Total Resources Available: | | |
| 7. Expenses: | | |
| Total tuition for courses and examinations | | |
| Residence: | | |
| Room and board | | |
| Utilities | | |
| Mortgage payments (principal, interest, taxes) | | |
| Other (specify) _____ | | |
| Transportation: | | |
| Principal and interest payments on owned or leased vehicles | | |
| Local transportation cost | | |
| Vehicle registration, insurance and fuel | | |
| Medical/dental expenses: | | |
| Clothing: | | |
| Food (ie. groceries, restaurants, etc.): | | |
| Childcare: | | |
| Debt payments (<i>other than mortgage and car</i>): | | |
| Entertainment: | | |
| Insurance: | | |
| Other (specify): _____ | | |
| Total Expenses: | | |
| Excess of Expenses (7.) over Resources (6.): | | |

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8. Financial Assistance

List all items for this quarter for which you are requesting support for:

| Item of Support | Cost | Amount covered by employer |
|-----------------|-------|----------------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Total support requested (total cost less amount covered by employer): _____

9. Employment History

List your last three (3) places of employment:

| Place of Employment | Position | Length of Employment |
|---------------------|----------|----------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

10. Prepare Cover Letter:

On an attached document, in 500 words or less, your cover letter should explain:

1. The reason(s) for requesting financial assistance.
2. The amount of support required and how the funds will be used.
3. Any alternative supports in place should you not receive support.
4. Any extenuating circumstances you are facing.
5. Your career goals.

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11. Check List

Before submitting your application to foundation@cpamb.ca:

- ☐ Verify that you have completed all sections of the application.
- ☐ Ensure that you have included all required areas of the cover letter.
- ☐ Attach a copy of your most recent T4 and any other relevant slips (ie. T3, T4A, T5).
- ☐ Attach a copy/screenshot of your transcript or course history with marks.

You can help the Foundation provide more impactful support to future CPAs. Consider sharing your story of how the CPA Manitoba Foundation has impacted your pursuit of the CPA designation so we can help raise further funding to help future CPAs in their journey to achieving the CPA designation.

Select one of the following options:

- ☐ I agree to have the Foundation contact me for an interview about my story.
- ☐ I do not wish to be contacted.

Date _____

Signature _____