

Application for Financial Assistance



CHARTERED PROFESSIONAL ACCOUNTANTS
OF MANITOBA FOUNDATION INC.

Financial Assistance: The intent of financial assistance is to assist CPA candidates or students with their tuition, student due payments or other barriers that limit educational success. It may also be used to cover a wide range of other expenses including transcript assessments, tutoring, private courses, travel assistance, child care, etc.

Criteria

Applicants must demonstrate financial need and meet the following criteria by the application deadline:

- Be a registered CPA PEP candidate or CPA preparatory student in good standing with the CPA Western School of Business (CPA WSB).
- Reside in Manitoba.
- Show satisfactory performance in prerequisite studies and a commitment to achieving 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 application information is kept confidential and reviewed solely by the CPA Manitoba Foundation's Student Support Committee. Personal details are redacted to ensure full anonymity and social insurance numbers are securely used solely for government-required documentation.

1. Personal Details:

Last Name: _____ First/Given Name(s): _____

Name Commonly Used: _____

Mailing Address: _____

Phone: _____ Personal Email: _____

Social Insurance Number (SIN): _____

Employer Name: _____

Business Address: _____

Position/Title: _____

Business Phone: _____ Business Email: _____

Have you received support from the CPA Manitoba Foundation in the past? This **will not reduce or impact 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.

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2. **Marital Status:** Married Common-law 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
 - Rent per month _____
- Shared Rental Accommodation
 - If applicable: rent per month _____
- With Parents/Family/Friends _____
- Own Residence:
 - If residence owned, date purchased? _____
 - Amount outstanding? _____
- Other (specify) _____

5. **Transportation:**

- Current means of transportation?
- Own Vehicle
 - Bus
 - None
 - Other (specify) _____

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	Monthly Amount	Annual Amount
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:		
Tuition for courses, examinations and dues	_____	_____
Residence:		
Rent	_____	_____
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:

Are you applying for tuition support? Yes No

- If "Yes," how much (if any) of your tuition is covered by your employer? _____

List all items (including tuition support) 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 current and last two (2) places of employment:

Organization	Position	Dates of Employment
_____	_____	_____
_____	_____	_____
_____	_____	_____

10. Personal Statement:

In an attached document, please provide a personal statement letter that addresses:

- Your reasons for requesting financial assistance, including any personal circumstances or challenges relevant to your funding request.
- The amount of support needed and how the funds will be utilized (as detailed in section 8 of the application).
- Any alternative support options available if you do not receive funding, including other financial aid, scholarships, or resources you are currently receiving or applying for.
- Any extenuating or challenging circumstances that demonstrate your financial need.
- Your career goals and any significant personal achievements.

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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 completed and attached your personal statement.
- Attach a copy of your most recent T4 (or 3 most recent pay stubs) and any other relevant slips (ie. T3, T4A, T5).
- Attach a most recent copy/screenshot of your CPA Western School of Business (CPA WSB) transcript or course history with grades.

12. Data Collection:

Please consider completing this section to help the Foundation better understand applicant diversity and ensure program accessibility and equity. This information is used solely for statistical purposes to improve outreach and it **does not impact eligibility or evaluation**. Data remains confidential and is not shared with the Student Support Committee.

1. Do you identify as a member of a visible minority? “Members of visible minorities” are defined as persons, other than Indigenous people, who are either non-Caucasian in race or non-white in colour or both.

- Yes No Prefer not to answer

2. Do you identify as an Indigenous person (i.e., First Nations, Inuit, Métis)?

- Yes No Prefer not to answer

3. Are you a person living with a disability? An “invisible disability” is used to describe a disability not perceived by others (i.e., chronic illnesses and conditions, cognitive and/or learning disabilities, mental health-related disabilities, etc.).

- I have a visible disability I have an invisible disability
 I have both a visible and invisible disability I do not have a disability
 Prefer not to answer

4. Which of the following best describes your gender identity? A “cisgender” describes a person’s gender identity that is consistent with that person’s sex assigned at birth.

- Cisgender man Cisgender woman
 Non-binary Two Spirited
 Gender Fluid Other: _____
 Prefer not to answer

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13. Your Story:

Your story can help the Foundation make a greater impact for future CPAs. Consider sharing how the CPA Manitoba Foundation has supported your journey toward the CPA designation to inspire additional funding and help more aspiring CPAs achieve their goals. **Responses will not affect eligibility or evaluation of your application.**

Select one of the following options:

- I agree to have the Foundation contact me for a conversation about my story and CPA journey.
- I do not wish to be contacted.

Date: _____ Signature: _____