



CPA Student Financial Assistance Program Application

SUBMITTED IN CONFIDENCE

Purpose

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

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

We recognize the information provided is confidential by nature and will be treated strictly as such. Applications submitted will be used to consider the funding request and destroyed after a decision has been made. The only information kept will be contact details of the applicant and the decision made, as well as the financial information required by CRA for accounting purposes if the applicant is provided funding.

Procedures

Complete the application form and submit:

- a recent transcript of marks,
- letter of reference, and
- a cover letter addressed to the CPA Nova Scotia Education Foundation.

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 are most in need and deserving.

Mail your completed application to the CPA Nova Scotia Education Foundation at 300-1871 Hollis Street, Halifax, NS B3J 0C3

Personal Information

Last Name: _____ First Name: _____

CPA 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? _____

Describe your work history for the past five years (indicate employer(s), position(s), 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.



Net Income Information

Please provide the following information related to your financial situation:

- A. Annual Income _____
- B. Annual Expenses _____
- C. Net Income (A-B) _____

Notes:

Annual Income should include the following, if applicable:

- Gross Earnings from employment
- Child Support/Alimony
- Income Support and/or Income from the Disability Benefits Program
- Employment Insurance Benefits
- Worker’s Compensation Board Benefits
- Pension Income
- Employer Funding for Education
- Scholarships or Bursaries
- Contributions from Family (incl. parents)
- All other sources of income, including monetary gifts

Annual Expenses should include the following, if applicable:

- Rent and/or Mortgage Payments
- Car Payments
- Childcare Costs
- Child Support/alimony you pay
- Living Expenses (Groceries, other bills)
- Amounts required for planned CPA Studies in the coming year

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):



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.

Declaration

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. As a student/candidate in the CPA Programs, I understand I am bound by the code of conduct. 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