

The Chartered Accountants Scholarship Fund Eligibility and Selection Criteria

Purpose

The purpose of the Chartered Accountants Scholarship Fund is to provide money for scholarships to marginalised and disadvantaged Australians. These scholarships must only be awarded to:

- a) Australian citizens or permanent residents of Australia, within the meaning of the *Australian Citizenship Act 1948*; and
- b) will be open to individuals or groups of individuals throughout Australia;
- c) will promote the recipient's education in a Tertiary Course being:
 - (i) the Chartered Accountants Program, which is a Tertiary Course conducted by the Founder; or
 - (ii) such other Tertiary Courses as are approved by the Board of Trustees from time to time;
- d) will be awarded for reasons of equity; and
- e) will be awarded to individuals selected by the Board of Trustees, who meet the following selection criteria:
 - (i) they must meet the ACOSS definition of poverty, that is, 'an enforced lack of socially perceived necessities';
 - (ii) they must demonstrate true financial need; and
 - (iii) they must demonstrate an interest in accounting and wish to undertake the Chartered Accountants Program or such other Tertiary Courses as are approved by the Board of Trustees from time to time.

Eligibility Criteria

An individual may make application for a grant from the Scholarship Fund where they:

- > Are an Australian citizen or permanent resident of Australia, within the meaning of the *Australian Citizenship Act 1948*
- > Are currently completing Year 12 in High School and/or have completed any one of the following:
 - o the Higher School Certificate (HSC)
 - o Victorian Certificate of Education (VCE)
 - o Queensland Certificate of Education (QCE)
 - o South Australian Certificate of Education (SACE)
 - o Western Australian Certificate of Education (WACE)
 - o Tasmanian Certificate of Education (TCE)
 - o ACT Year 12 Certificate
 - o Northern Territory Certificate of Education (NTCE)
 - o International Baccalaureate Diploma (IB)
- > Meet the ACOSS definition of poverty, that is, 'an enforced lack of socially perceived necessities';
- > Demonstrate true financial need
- > Have been accepted to study an accounting related bachelor degree at an Australian University and/or have completed a bachelor degree accredited by the Institute of Chartered Accountants Australia and intend to register and enrol in the Chartered Accountants Program run by the Institute of Chartered Accountants Australia.

Selection

The selection process is managed by the Foundation Manager and decisions on grants are made by the Board of Trustees, by way of recommendation from the Grants Advisory Committee.

The selection process will include:

- > Submission of the application form;
- > Submission of confidential referee reports;
- > Short listing of applicants;
- > Interviews;
- > Recommendations submitted to the Board of Trustees of the CA Benevolent Foundation

Application Process

- > Application is to be made using the official application form on the Foundation's page on the website.
- > Include a CV.
- > Two references from the applicant's referees.

Award Details

Scholarships will be awarded each year if the application meets the approval of the Board of Trustees of the Chartered Accountants Benevolent Foundation.

The successful applicants will be required to present a report at the completion of their degree and may be required to consent to their names and stories being used by the Board of Trustees for the purpose of promoting the fund.

Guide to Scholarship Applications

How to Apply

To apply for a scholarship you will need to complete the Chartered Accountants Benevolent Foundation Scholarship Application form and supply the supporting documents as specified on the application form.

References

In support of your application you will also need to provide two referee reports from individuals who have known you for more than three months.

The referee's you approach to support your application must be able to attest to your need for financial assistance to continue further education and comment on your drive and ambition, academic performance and capacity to pursue higher studies. Suitable people to provide references include teachers, lecturers and school principals. These individuals must not be related to you.

Referee reports must be original and dated within 3 months of your application submission. Referee reports must be provided on the specified referee report forms, or school/university/company letterhead.

Supporting Documentation

Documents provided in support of your application must be certified copies of the originals. No original copies should be sent as the Foundation is unable to return original documents.

For the purposes of confirming your current enrolment in a year 12 secondary school level course, a letter from your school principal should be provided.

For the purposes of confirming your acceptance into a relevant university course, a certified copy of your acceptance/admission letter should be provided.

For the purposes of confirming your current enrolment in a relevant university course, a certified copy of your most recent academic transcript should be provided.

Certification of your documents

Copies of your documents must be certified before you submit them with your application.

The following persons/agents are acceptable authorities for certifying documents for the Foundation:

- Australian Chartered Accountant (must include membership number)
- Australian embassy, consulate or high commission staff member
- University official (must include university stamp)
- Notary public
- Solicitor, legal practitioner, magistrate
- Justice of the peace
- Commissioner for declarations, Commissioner for affidavits or Commissioner for oaths

- Police officer (in Australia only)
- Pharmacist (in Australia only)
- Postal manager (in Australia only)
- Australian Certified Practising Accountant (must include membership number).

The person certifying the academic records must sign every page of the document. On the final page the following details regarding the person/agent certifying the records must be provided legibly:

- Their full name
- The authority in which they are making this certification (from the list above), and any other information that we have said above that we require to support that authority (e.g. membership or registration number)
- A statement that they have seen and compared the original to the copy that they are certifying and that it is a true copy
- Their signature.

Submitting your Application

The application and supporting documentation should be posted to the Foundation:

Foundation Manager
Chartered Accountants Benevolent Foundation
GPO Box 9985 Sydney NSW 2001

What to expect after you have submitted your application

The Foundation accepts applications within the advertised application period. Following the close of the application period, your application will be reviewed by the Foundation Manager and Grant Advisory Committee and a recommendation will go to the Board of Directors for review and decision. The Foundation awards three scholarships annually and the Board of Directors are responsible for the awarding of scholarships. You will be advised of the outcome following the meeting of the Board of Directors and if your application is successful, further information will be provided on how the scholarship grant is awarded and paid.

Scholarship Fund FAQs

What if I have missed the application closing date?

If you have missed the application closing date you will need to wait until the next application period to submit your application. The Foundation accepts applications twice a year for the scholarship grant and these periods are specified on the website.

When can I apply for a scholarship?

The Foundation accepts applications twice a year for the scholarship grant and these periods are specified on the website. You must be in year 12, completed year 12, accepted to study a relevant degree at university or currently be enrolled in a relevant accounting degree to be eligible to apply.

How many scholarships are awarded?

The Foundation awards three scholarships annually.

Who will see my application?

Your application will be reviewed by the Foundation Manager and their staff, the Grant Advisory Committee and the Board of Directors. Should your application be successful, you will be contacted regarding the promotion of your scholarship and the information provided within promotions. Any information shared with those outside of the Foundations requires your approval.

What if I cannot get two references?

If you are unable to provide two references, then you are ineligible for the grant. If you're not sure who can be a referee or need some guidance, contact the Foundation and we will be happy to provide you with some ideas on who you might be able to ask.

Why does the referee need to have known me for at least 3 months?

The referee needs to know you to be able to attest to your need for financial assistance to continue further education and comment on your drive and ambition, academic performance and capacity to pursue higher studies. The Foundation believes a minimum period of 3 months is required for a referee to build a suitable picture of your skills and attitude towards further study to be in a position to provide a reference.

Application to the Chartered Accountants Scholarship Fund for a Scholarship

Identification Number (office use)

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Please complete ALL the sections (1 – 9) below, and return the application to the Foundation's office (see page 6 for contact details). **Please print in BLOCK LETTERS.**

Section 1 – Personal details

 Title Mr Mrs Miss Ms Dr

 Given name/s
(in full)

Family name

Preferred name

Date of birth

 / /

 Citizenship status Australian Citizen* Permanent Resident*

*Note you must be an Australian Citizen or Permanent Resident of Australia to be eligible to apply.

 Australian Chartered Accountant Partner/Child of a Australian Chartered Accountant

Section 2 – Contact details

1. Personal contact details

Street address

State

Postcode

Country

PO Box address

State

Postcode

Country

Email

Phone

Mobile

2. Preferred contact details

 Postal address: Home street address Home PO Box address

Privacy Policy

The Chartered Accountants Benevolent Foundation respects the privacy of individuals and acknowledges that the information you provide on this form is 'personal information' as defined by the Commonwealth Privacy Act. The information is being collected for the purposes of assessing your eligibility for a scholarship from the Chartered Accountants Scholarship Fund and processing your application for a scholarship. The provision of this information is voluntary, but if it is not provided the Foundation may be unable to process your application. The information provided will be viewed by Foundation staff, the Grant Advisory Committee and the Foundation's Board of Directors. For more information on the Foundation's privacy policy, or to obtain a copy, please contact the Foundation.

Office Use Only

Application Received

 / /

Application Recorded in Register

 / /

 Applicant Eligible for Scholarship Yes No More Information Required

Section 3 – Education details

Please list the details of your secondary and/or tertiary qualifications. Certified copies of your qualifications must be attached.

Secondary Qualification:

Currently completing Year 12 **OR** Completed Year 12 / /

Currently completing or have completed the following course:

- Higher School Certificate (HSC)
- Victorian Certificate of Education (VCE)
- Queensland Certificate of Education (QCE)
- South Australian Certificate of Education (SACE)
- Western Australian Certificate of Education (WACE)
- Tasmanian Certificate of Education (QCE)
- ACT Year 12 Certificate
- Northern Territory Certificate of Education (NTCE)
- International Baccalaureate Diploma (IB)

Tertiary Qualification:

Name of degree

Name of university

Year of degree Accepted not yet commenced 1st Year 2nd Year 3rd Year 4th Year

Full-time Part-time

Commenced / / Completed / /

Section 4 – Further studies

Detail the reasons that you want to undertake further study and why you have selected a relevant degree.

Section 5 – Career aspirations

Please outline your career aspirations.

Section 6 – Financial information

Financial support for studies

Are you receiving any other financial support for your studies e.g. scholarship, bursary, prizes, residential scholarship? If so, please give detail. You may wish to attach documentation.

	Name of Benefit	Benefit Provider	Amount Received	Date/s
Benefit #1				
Benefit #2				
Benefit #3				
Benefit #4				

Income

Do you undertake any paid employment? Yes No

Do you receive any other financial support Yes \$ No

Estimated total income per week \$

Estimated total income per year \$

Estimated total income per year \$ **Briefly describe your financial circumstances.**

What sort of family support do you receive?

Do you receive any other assistance or pensions?

The following questions are designed to assist in the review of your application.

Are you of Aboriginal or Torres Strait Islander origin? No Yes, Aboriginal Yes, Torres Strait Islander

Were you born in Australia? Yes No

If you were not born in Australia, in what year did you first arrive in Australia to live here?

Was your Mother born in Australia? Yes No

Was your Father born in Australia? Yes No

How well would you say you speak English? Very Well Well Not Well Not at all

Did your parents complete a University degree? No, neither did Yes, Mother did Yes, Father did

Do you have a condition which requires assistance?

- No need for assistance
- Short-term health condition (lasting less than six-months)
- Long-term health condition (lasting six-months or more)
- Disability (lasting six-months or more)
- Difficulty with the English language
- Other

Section 7 – References

Applicants are required to arrange for two confidential reports (forms attached at appendix) to be forwarded to the Foundation Manager with the application form by the application closing date. The referees should report on your drive and ambition, academic performance and capacity to pursue higher studies.

It is the applicant's responsibility to ensure that the referees' reports are received by the Foundation with permission granted by the referees for the Foundation to contact them directly.

Referee #1

Title Mr Mrs Miss Ms Dr

Given name/s

Family name

Your position

Company name

Company / home address

Phone (work)

I have known this referee for YY years MM months

Referee #2

Title Mr Mrs Miss Ms Dr

Given name/s

Family name

Position

Company name

Company / home address

Phone (work)

I have known this referee for YY years MM months

Section 8 - Declaration

Please tick the relevant box the the questions below.

In consideration of the Chartered Accountants Benevolent Foundation's evaluation of my application for a scholarship:

1. I agree to produce such further evidence and information in relation to this application as may be required by the Foundation and attest that the information is true and correct. Yes No

2. In consideration of the Foundation's evaluation of my application for a scholarship, I understand and agree that confirmation of my responses may be sought. These checks may include, but are not limited to, verification of my qualifications and financial circumstances. Yes No

3. I hereby authorise the Foundation and its authorised nominees to collect, use, disclose and store personal information about me from third parties, for the purpose of verifying trhe information provided in my application. Yes No

4. I allow third parties holding personal information about me to release such information to the Foundation and its authorised nominees. Yes No

5. I agree to my first name, state and generalised description of circumstances being used in the promotion of the Foundation should I receive a scholarship. I understand that I will be given the promotional content to review and authorise prior to publication. Yes No

Applicant's signature

Date DD / MM / YYYY

Section 9 - Checklist

To ensure your application is complete and can be processed, please review the checklist below and ensure all relevant documentation is attached.

- | | |
|---|--|
| <input type="checkbox"/> Completed all sections of the application (1-8) | <input type="checkbox"/> Attached two Referee Reports |
| <input type="checkbox"/> Attached a CV/Resume | <input type="checkbox"/> Attached a copy of most recent Tax Return |
| <input type="checkbox"/> Attached proof of Australian Citizenship or Permanent Residency | <input type="checkbox"/> Attached confirmation of acceptance/current studies in a relevant accounting degree (if applicable) |
| <input type="checkbox"/> Attached a letter/documentation confirming currently in Year 12 signed by the School Principal (if applicable) | |

Section 10 - Submitting your application form

Please submit your completed application with supporting documentation to:

Foundation Manager
Chartered Accountants Benevolent Foundation
GPO Box 9985
Sydney NSW 2001

NOTE Please ensure you keep a copy of this application and the attachments for your records. Please only send certified copies of documents, and do not send originals. Originals will not be returned.

Section 11 - For enquiries or additional information

If you have any questions in relation to the completion of the application form, referee reports, additional information to attach of the Scholarship Fund/Foundation in general, please contact the Foundation Manager Pamela Lee via pamela.lee@charteredaccountants.com.au.

Appendix 1 - Written Reference One

Application for a Scholarship grant from the Chartered Accountants Scholarship Fund.

Applicant's full name

Please provide a reference for the above applicant covering the applicant's drive and ambition, academic performance and capacity to pursue higher studies.

I have known the applicant for years months and confirm I am not related to the applicant.

Referee name

Applicant's
signature

Date / /

Appendix 2 - Written Reference Two

Application for a Scholarship grant from the Chartered Accountants Scholarship Fund.

Applicant's full name

Please provide a reference for the above applicant covering the applicant's drive and ambition, academic performance and capacity to pursue higher studies.

I have known the applicant for years months and confirm I am not related to the applicant.

Referee name

Applicant's signature

Date / /