



APPLICATION FOR BURSARY ASSISTANCE 2022-2023

Submission deadline - May 1, 2022

St. Mary's Academy is dedicated to assisting students who qualify but cannot afford an Academy education. Several bursary funds exist which provide tuition assistance to qualified families. Bursaries are awarded on a financial needs basis. Families with limited gross household income and net assets are invited to apply for a bursary. A bursary will not be granted to cover the full cost of tuition as each family is responsible for the \$600/student non-refundable deposit. The confidential bursary process is managed by the SMA Bursary Committee and begins after the school has accepted a student. Families are required to re-apply every year to ensure their financial information is up to date.

St. Mary's Academy's philosophy and approach to the bursary process is that each family should contribute to the greatest extent possible towards the educational cost of the student. We understand that the financial commitment to a St. Mary's Academy education could mean reduced discretionary funds available to the family for activities including, but not limited to, vacations, retirement savings, club memberships and camps. St. Mary's Academy's Bursary Assistance is not intended to supplement or enhance the lifestyle of the family.

SMA is grateful for the generous donors who contribute to our bursary funds. It is the SMA Bursary Committee's fiduciary responsibility to select suitable bursary recipients in accordance with the established bursary program criteria.

In early June, all bursary applicants will receive a letter stating whether or not a bursary has been extended to the student(s). A personalized tuition statement and payment plan will accompany the bursary letter.

Instructions

1. Each family should submit one application regardless of the number of students attending SMA. If, however, parents are no longer living together and splitting tuition, each parent must submit an application for their portion of tuition.
2. All answers should be typed, printed or written legibly. Please do not use pencil or red ink.
3. Please answer every question. If the answer is "nil" or "not applicable" enter "NIL" or "N/A".
4. Please ensure copies (not originals) of the following are enclosed for all parent(s)/guardian(s):
 - a. A copy of all information slips (ex. T4, T4A, T3, T5, etc.) for 2021.
 - b. A copy of your income tax returns for the year 2021.
 - i. If you have **rental income**, please enclose Schedule T776.
 - ii. If you are **self-employed**, please provide a Statement of Business/Professional Activities T2125.
 - iii. If you have a **Corporation**, please enclose the T2 - Corporate tax return.
(The schedules requested refer to the detail pages not the summary.)
 - c. The bursary application form.
 - d. A copy of your Canada Revenue Agency Notices of Assessment (NOA) for 2021.
(If your NOA is not available when you file your bursary application, please submit it as soon as you receive it.)
5. All forms and questions should be directed to:

Nadine Dannenberg

St. Mary's Academy

550 Wellington Crescent, Winnipeg, MB R3M 0C1

(204)478-6048 or bursary@smamb.ca

Incomplete applications will not be processed. Your application will not be considered complete until all required documentation and forms have been received by the school. It is your responsibility to submit all information, including the complete tax return(s) by May 1st regardless of your tax filing deadline with CRA. Applications submitted after the deadline may not be accepted.

1. Identification

First Daughter - attending SMA in 2022-2023

Name _____
Last Name _____ First _____

Address _____
Street _____ City, Province _____ Postal Code _____

Lives with _____ Grade in September 2022 _____

Second Daughter - attending SMA in 2022-2023

Name _____
Last Name _____ First _____

Address _____
(if different from 1st student) Street _____ City, Province _____ Postal Code _____

Lives with _____ Grade in September 2022 _____

Third Daughter - attending SMA in 2022-2023

Name _____
Last Name _____ First _____

Address _____
(if different from 1st student) Street _____ City, Province _____ Postal Code _____

Lives with _____ Grade in September 2022 _____

If additional space is required attach information to this application.

2. Parental/Guardian Identification

	Mother/Guardian 1	Father/Guardian 2
Name	_____ Last Name _____ First _____	_____ Last Name _____ First _____
Phone Number & Email	_____	_____
Relationship to Student	_____	_____
Occupation/Employer	_____	_____
Address	<input type="checkbox"/> Same as above If different from student(s)	<input type="checkbox"/> Same as above If different from student(s)
Street	_____	_____
City	_____	_____
Postal Code	_____	_____

3. Children

List all children, not including the applicant(s), who are residing in your home and will receive support from you in the upcoming school year.

Name	Age	Disabled?	School	Grade/Year	Tuition
					\$
					\$
					\$
					\$
					\$

4. Income As Reported on Income Tax Return

	Mother/Guardian 1 2021 Actual	Mother/Guardian 1 2022 Estimate	Father/Guardian 2 2021 Actual	Father/Guardian 2 2022 Estimate
Total Income (line 150)				
Net Income (line 236)				
Taxable Income (line 260)				
Tax Payable (line 435)				
Taxable Dividends (line 120)				
Actual Dividends				
Taxable Capital Gains (line 127)				
Actual Capital Gains				

5. Explanation of any significant differences between 2021 actual amounts and 2022 estimates.

6. Other Non-Taxable Income

	Amount	Frequency	Source
GST Credit	\$ _____	_____	_____
Canada Child Benefit	\$ _____	_____	_____
Manitoba Child Benefit	\$ _____	_____	_____
Gifts	\$ _____	_____	_____
Settlements	\$ _____	_____	_____
Long Term Disability/Disability Pension	\$ _____	_____	_____
Child Support	\$ _____	_____	_____
Scholarship/Grants (do not include SMA bursary)	\$ _____	_____	_____
Other income not specified	\$ _____	_____	_____

7. Other Financial Information

If someone else resides with you or contributes towards expenses, how much do they contribute? \$ _____

Trust funds of which any of the family are beneficiaries. \$ _____

Is there a restriction on the use of the trust fund? Yes No

Athletic/Extra-curricular fees paid in 2021 \$ _____

Amount in Registered Educational Savings Plans (RESP) \$ _____

Contributed by: _____

8. Personal Assets *If asset is joint, please include the total value in "Joint or Mother/Guardian 1" column

Assets	Joint or Mother/Guardian 1	Father/Guardian 2
Home - owned (Assessed Value)	\$ _____	\$ _____
Date of Purchase		
Cottage	\$ _____	\$ _____
Other Real Estate	\$ _____	\$ _____
Bank Accounts & Cash	\$ _____	\$ _____
RRSP	\$ _____	\$ _____
Mutual Funds (other than RRSP)	\$ _____	\$ _____
Tax Free Savings Accounts	\$ _____	\$ _____
Term Deposits	\$ _____	\$ _____
Savings Certificates/Treasury Bills	\$ _____	\$ _____
GICs	\$ _____	\$ _____
Shares/Stocks	\$ _____	\$ _____
Bonds	\$ _____	\$ _____
Other Assets Not Specified	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

Vehicles, Boats, Recreational Vehicles, Trailers – Owned/Leased

Make / Model	Vehicle Year	Date Purchased/Leased	Monthly payment (if applicable)

9. Personal Liabilities *If liability is joint, please include the total value in "Joint or Mother/Guardian 1" column

	Joint or Mother/Guardian 1		Father/Guardian 2	
	Amount Outstanding	Monthly Payments	Amount Outstanding	Monthly Payments
Mortgage	\$	\$	\$	\$
Rent	\$	\$	\$	\$
Bank Loans	\$	\$	\$	\$
Overdrafts	\$	\$	\$	\$
Line of Credit	\$	\$	\$	\$
Credit Cards	\$	\$	\$	\$
Finance Companies	\$	\$	\$	\$
Other (specify)	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
TOTAL	\$	\$	\$	\$

10. Who will be paying tuition and in what amount or portion? (Total 2022-2023 tuition = \$8,150)

	Amount	or	% of Tuition
_____	\$ _____		_____ %
_____	\$ _____		_____ %

11. Explanation of any unusual expenses or special financial commitments or further information pertinent to this application.

12. Declaration, Agreement and Consent of Parent(s)/Legal Guardian(s)

By signing below, I hereby declare that all of the information provided in this Application for Bursary Assistance is true and complete to the best of my knowledge. I understand that if any of the information provided in this Application changes at ANY time during the period of study at St. Mary's Academy of any student named in this Application I am obliged to report any such change to St. Mary's Academy immediately, and I hereby agree to do so.

Also by signing below, I hereby expressly consent to St. Mary's Academy:

- a. Verifying and investigating any information supplied by me in this Application, including information regarding revenues and expenses from Canada Revenue Agency, for the purpose of assessing eligibility for a **School Bursary**; and
- b. Using the information provided in this Application, together with any additional information collected by St. Mary's Academy as part of its consideration of this Application, for the purpose of determining whether or not it will award a bursary in response to this Application and, if so, in what amount.

Signature of Parent/Legal Guardian

Signature of Parent/Legal Guardian

Name of Parent/Legal Guardian

Name of Parent/Legal Guardian

Social Insurance Number

Social Insurance Number

Date (mm/dd/yyyy)

Date (mm/dd/yyyy)

APPLICATION DUE MAY 1, 2022

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