

Financial Assistance Fund

Gisborne/East Coast (Accounting Student)

Chartered Accountants Australia and New Zealand (ABN 50 084 642 571) – (CA ANZ, us or we) offers support for potential members who have an affiliation with the Gisborne/East Coast area. Applications for this support are available to students proposing to enter the CA or AT Programs.

The criteria for eligibility to apply for the Financial Assistance Fund is as follows:

The Financial Assistance Fund (the Funding Program)

Subject to these Terms, CA ANZ will make available a maximum of \$4,500 through the Funding Program across all successful Applicants. The exact amount that a successful Applicant will receive will be determined by CA ANZ at its sole discretion and based on CA ANZ's assessment of the suitability of the Applicant for the Funding Program.

The application eligibility criteria

The students/applicants:

- A. Must be currently studying or have a demonstrable intention to study towards a degree designed to fulfil the academic requirements for entry into Chartered Accountants Australia and New Zealand as a chartered accountant or accounting technician.
- B. Must be able to demonstrate their affiliation with the Gisborne/East Coast region.
- C. Complete a full application and provide supporting documentation as required by the application process.
- D. Be seen as a contributor to school life and a positive person of the Gisborne/East Coast community.

The Application process

Students/applicants who wish to make a application for consideration should visit www.younlimitedanz.com to download the application form.

The Funding Program contact

Regional Manager
Chartered Accountants Australia and New Zealand
Telephone: 07 579 9594
Email: scholarships@charteredaccountantsanz.com

Application submissions

Applications must be made in writing with covering letter including applicants current Curriculum Vitae and supporting documentation.

Application Supporting Document Requirements

- (a) a brief resume/curriculum vitae;
- (b) a colour scanned copy of your latest year of academic history / transcript showing subjects passed and grades awarded, and the years in which you passed with copies of relevant certificates;
- (c) details of your work history (if any) including your current occupation (if any);
- (d) a brief (one page maximum) statement setting out your personal circumstances, including what the Funds would enable you to do;
- (e) a brief (one page maximum) statement setting out your planned professional career and your future aspirations; and
- (f) any other information reasonably requested by CA ANZ in order to assess the suitability of the Applicant for the Funding Program

Written applications

The completed Application Form must be emailed to CA ANZ at scholarships@charteredaccountantsanz.com with the subject line "Application for Gisborne Scholarship 2019 [applicants name]".

Applications terms

The terms and conditions which apply to the Funding Program (Terms) are set out at the end of this Application Form. All applications received before closing date will be considered against the eligibility criteria (refer overleaf in the Terms). The awarding of the Funds is solely at the discretion of the CA ANZ and its appointed Funding Program selection panel.

The closing date for applications is Thursday 31 October 2019.

Section 1 – Personal details

Name	<input type="text"/>			
Email address	<input type="text"/>			
Contact phone	<input type="text"/>	<input type="text"/>	Mobile	<input type="text"/>
Postal address	<input type="text"/>			
	<input type="text"/>			

Section 2 – Academic history

Secondary/University	Years Attended		Qualification (gained or in progress)
	From	To	

Section 3 – Tertiary provider

At which university/tertiary provider are you registered or intend to register for 2020?

If you are already registered as a student what was the date of your initial registration?

Section 4 – Employment history (if applicable)

Company/Organisation

Occupation/Title

Address

Contact

How long have you been employed with the listed employer?

Section 5 – Referees

Please provide names of two people whom you have asked to provide confidential references. Your references must ensure that their written statements are emailed to scholarships@charteredaccountantsanz.com by Thursday 31 October 2019 with the subject line "Reference for [your name] for Financial Assistance Fund" or attached to your application form. References may also be verbal and will be followed up after application form is received.

Referee One

Name/Title

Email

Contact phone

 Mobile

Postal Address

Referee Two

Name/Title

Email

Contact phone

 Mobile

Postal Address

Section 6 – Curriculum Vitae (CV)

Please include a CV with this application including the following information:

- (a) a brief resume/curriculum vitae;
- (b) a colour scanned copy of your latest year of academic history / transcript;
- (c) details of your work history (if any) including your current occupation (if any);
- (d) a brief (one page maximum) statement setting out your personal circumstances, including what the Funds would enable you to do;
- (e) a brief (one page maximum) statement setting out your planned professional career and your future aspirations; and
- (f) any other information reasonably requested by CA ANZ in order to assess the suitability of the Applicant for the Funding Program.

Section 7 – Privacy collection statement

Chartered Accountants Australia and New Zealand (ABN 50 084 642 571) (CA ANZ) collects, uses and discloses your personal information provided or collected in connection with your Application such as your personal details (name, address, email, phone and mobile number), qualification and educational details, and other personal information provided in relation to your Application in connection with managing, administering and assessing your Application and managing, administering and assessing the Funding Program if you are a Funding Recipient.

We collect this information directly from you in the Application Form as well as from third parties such as your nominated referees and educational institutions.

If you do not provide your personal information in the Application, we may be unable to process your Application and you will not be eligible to apply for the Funding Program.

We may disclose your personal information to the Committee members as well as agents contractors and service providers such as where we outsource functions.

By completing the Application Form, unless you opt-out, you consent to us also using and disclosing your information for promotional and marketing purposes. You can opt-out at any time by contacting us at privacy@charteredaccountantsanz.com or on 1300 137 322 in Australia or 0800 469 422 in New Zealand.

Your information will also be used and disclosed as set out in CA ANZ's Privacy Policy, available at www.charteredaccountantsanz.com/privacy.

It is likely that your personal information will be disclosed to overseas recipients (as provided in our Privacy Policy, including the location of those entities). The Privacy Policy sets out we handle your personal information, including how you can seek to access and correct your information or raise a privacy concern with us and how it will be dealt with as well as details about the disclosure of your information to entities overseas.

Section 8 – Acknowledgement and Declaration

Capitalised words have the same meaning giving in the attached Terms. The Terms should be read before completing this acknowledgement and declaration.

By signing the personal declaration below, you acknowledge, agree and confirm (as applicable) that:

- a. The information you have provided in this Application Form and in the attached documents will be used for the purpose of assessing your Application for the Funding Program.
- b. All information which you have supplied with your Application, including in this Application Form is true and correct.
- c. Personal information contained in your Application will be made available to members of the Funding Program Committee.
- d. You have obtained the consent of your nominated referees to supply their personal information to CA ANZ in connection with this Application and that their personal information will be handled in accordance with CA ANZ's Privacy Policy.
- e. In assessing your Application members of the Committee may contact referees that you have nominated in this Application.
- f. You agree to co-operate with any publicity for this Financial Program and understand such publicity may include Materials of you to be used by CA ANZ.
- g. You have read and agree to be bound by the Terms (attached), including the Privacy Collection Statement above.
- h. You have read and accept the terms of CA ANZ's Privacy Policy.

Signed

Date

Email your application to:

scholarships@charteredaccountantsanz.com with the subject line "Application for Gisborne Scholarship 2019 [applicants name]".

Terms and Conditions – CA ANZ Gisborne/East Coast (Accounting Student) Financial Assistance Fund

1. Introduction

- 1.1 These terms and conditions (**Terms**) apply to all individuals (**Applicants, you**) making applications in respect of the Gisborne/East Coast (Accounting Student) Financial Assistance Fund program detailed in clause 2 (Funding Program) offered by Chartered Accountants Australia and New Zealand (ABN 50 084 642 571) (CA ANZ, us or we).

2. The Funding Program

- 2.1 Subject to these Terms, CA ANZ will make available a maximum of \$4,500 through the Funding Program across all successful Applicant/s. Successful Applicant/s (**Funding Recipient**) towards the Funding Recipient's accounting studies (**Approved Purpose**). The exact amount that a successful Applicant will receive will be determined by CA ANZ at its sole discretion and be based on CA ANZ's assessment of the suitability of the Applicant for the Funding Program.
- 2.2 The Funding Program may, in CA ANZ's sole and absolute discretion, be awarded to (including the amount of such award) the best-qualified Applicant/s based on the criteria set out in these Terms and the Application Form.
- 2.3 The Funding Programs are deemed to be effective from the date they are awarded by CA ANZ.

3. Eligibility

- 3.1 You must not apply for the Funding Program unless you meet the eligibility criteria set out in these Terms.
- 3.2 To be eligible for the Funding Program, Applicants must:
- 3.2.1 meet the specified criteria set out in the Application Form;
 - 3.2.2 demonstrate your affiliation to the Gisborne/East Coast region;
 - 3.2.3 be studying or have a demonstrable intention to study towards a qualification which fulfils the academic requirements to be a member of CA ANZ in one of the following designations:
 - (a) Accounting Technician; or
 - (b) Chartered Accountant.
 - 3.2.4 Be seen as a contributor to school life and a positive person of the Gisborne/East Coast community
 - 3.2.5 not have received assistance from the Gisborne/East Coast Financial assistance fund previously

4. Application Procedure and Selection Criteria

- 4.1 Only Applicants who meet the eligibility criteria set out in these Terms and who submit a complete Application will be considered for the Program.
- 4.2 Each Applicant must:
- 4.2.1 have a demonstrable intention to enrol or be enrolled in a course of study towards a qualification which fulfils the academic requirements to be a member of CA ANZ in one of the following designations:
 - (a) Accounting Technician; or
 - (b) Chartered Accountant;
 - 4.2.2 complete the application form (**Application Form**) in full, providing all required documentation including:
 - (a) a brief resume/curriculum vitae;

- (b) a colour scanned copy of your latest year of academic history / transcript showing subjects passed and grades awarded, and the years in which you passed with copies of relevant certificates;
- (c) details of your work history (if any) including your current occupation (if any);
- (d) a brief (one page maximum) statement setting out your personal circumstances, including what the Funds would enable you to do;
- (e) a brief (one page maximum) statement setting out your planned professional career and your future aspirations; and
- (f) any other information reasonably requested by CA ANZ in order to assess the suitability of the Applicant for the Funding Program,

4.2.3 sign all required declarations and acknowledgments on the Application Form and initial and date each page of the Application Form;

4.2.4 be able to demonstrate that you intend to pursue accounting as a career;

4.2.5 be available to attend an interview (either in person at CA ANZ offices in New Zealand or via teleconference) to discuss your Application at a mutually agreeable time.

4.3 Application must be emailed to scholarships@charteredaccountantsanz.com with the subject line "Application for Gisborne Scholarship 2019 [applicants name]".

4.4 Applications open **Thursday 1 August 2019** and must be received by **Thursday 31 October 2019**. Applications received after this date will not be eligible to be considered for the Funding Program.

5. Assessment of Applications

- 5.1 CA ANZ and its appointed Funding Program selection panel (the **Committee**) will evaluate each Application based on:
- 5.1.1 the quality of the information provided by the Applicant in the Application;
 - 5.1.2 endorsements provided by the Applicant's referees, including via reference checks; and
 - 5.1.3 the Applicant's extra-curricular activities, community involvement and career ambitions.
- 5.2 Decisions made by CA ANZ and/or the Committee will be final and no correspondence or discussion will be entered into.
- 5.3 By submitting an Application, the Applicant acknowledges that CA ANZ and the Committee will be collecting personal information about them as set out in the Privacy Collection Statement contained in the Application Form and will rely on such information for the purposes of determining the outcome of the Application.
- 5.4 By signing the declaration on the Application Form the Applicant confirms that the information provided by the Applicant is true and correct in every respect.
- 5.5 A false or misleading declaration made by an Applicant will render an Application invalid and CA ANZ reserves all rights to take any further action, including disciplinary action, available to it.
- 5.6 The Applicant acknowledges that CA ANZ is not obligated to award the Funds for the Funding Program and that the Funds are awarded at CA ANZ's absolute discretion.

- 5.7 The Applicant authorises CA ANZ and/or the Committee to lawfully obtain at any time from any person or entity, any information about the Applicant that CA ANZ and/or the Committee considers reasonably necessary for the purposes of assessing and processing the Application and the Applicant authorises such person or entity to release such information.
 - 5.8 Unsuccessful Applicants may re-apply in subsequent years for the Funding Program.
 - 5.9 The Funding Program may be held concurrently with other awards or scholarships obtained by the Applicant. However, Applicants must include in their Application details of any other funding of any nature applied for or already awarded to the Applicant. If funds have already been received, Applicants should include details of how those funds were applied.
- 6.6.1 terminate the Funding Program, in the event of which, CA ANZ will not be obliged to make any further payments to the Funding Recipient; and/or
 - 6.6.2 require the Funding Recipient to refund all or part of the Funds paid to, or on behalf of, the Funding Recipient.
- 6.7 All applicants, including the Funding Recipient, acknowledge and agree that nothing in this Funding Program, including being selected as a Funding Recipient, provides any indication or guarantee that any subsequent applications by that Funding Recipient for membership with CA ANZ (whether provisional or otherwise) will be approved.

6. Funding Recipient Terms and Conditions

- 6.1 Funding Recipients must sign the Acknowledgement and Declaration in the Application Form confirming that he/she agrees to the Terms under which the Funding Program has been awarded and must provide a copy to CA ANZ before any Funds will be paid.
- 6.2 Once awarded, the Funds will be paid by CA ANZ into the Funding Recipient's nominated bank account.
- 6.3 The Funding Recipient must:
 - 6.3.1 acknowledge to CA ANZ in writing receipt of all Funds.
 - 6.3.2 only use the Funds for the Approved Purpose, and must not use the Funds for any other reason;
 - 6.3.3 not use the Funds for payment of other professional membership fees or any other purpose not expressly authorised by CA ANZ in writing;
 - 6.3.4 provide evidence to CA ANZ that the Funds have only been used for the Approved Purpose; and
 - 6.3.5 provide any other information or reports reasonably requested by CA ANZ in respect of the use of the Funds or the Funding Recipient's progress in respect of the Approved Purpose.
- 6.4 The Funding Recipient agrees to be an ambassador for the Funding Program for the period the Funding Program until 12 months after completion of the Funding Program including to:
 - 6.4.1 co-operate with CA ANZ in respect of publicity for the Funding Program including to be photographed and videoed;
 - 6.4.2 attend events, including award ceremonies, media commitments or similar in connection with the Funding Program as reasonably required by CA ANZ (taking into account your availability); and
 - 6.4.3 provide short, accurate and not misleading testimonials about your experience of the Funding Program; and

(Funding Program Services).
- 6.5 In consideration of being awarded the Funds, the Funding Recipient acknowledges and agrees that:
 - 6.5.1 any materials created as part of providing the Funding Program Services **(Materials)** are owned by CA ANZ and vest in CA ANZ on creation; and
 - 6.5.2 as the owner of such Materials, CA ANZ may use the Materials in its own discretion, in any format, without any further permission or consent from you.
- 6.6 In the event that CA ANZ or the Committee becomes aware that any information provided to it by the Funding Recipient is false, erroneous or misleading, then, without limitation but subject to applicable laws, CA ANZ may: