



## ST. MARY'S ACADEMY

550 Wellington Crescent, Winnipeg MB, R3M 0C1

204-477-0244

www.smamb.ca

SMA account #: \_\_\_\_\_

\*Account # to be entered by SMA staff

### APPLICATION FOR BURSARY ASSISTANCE 2023-2024

**Submission deadline - May 1, 2023**

St. Mary's Academy is dedicated to assisting students who qualify but cannot afford an Academy education. We work with all families to exercise our mission and achieve our goal where a student is not turned away because of a family's inability to pay the tuition fees.

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. 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. If a bursary application is accepted, the award will range from \$500 to the full tuition amount (less the \$600 non-refundable deposit).

The confidential bursary process is managed by the SMA Bursary Committee and begins after the school has accepted a student. Student acceptance is independent from the bursary application process.

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. Families are required to re-apply every year to ensure their financial information is up to date.

#### 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. Unless there is a legal document specifying that one parent/guardian is responsible for the full tuition, both legal parents/guardians must submit their respective information for a bursary application to be assessed.
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 2022
  - b. A copy of your income tax returns (T1) for the year 2022
    - 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 own 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 2022  
(If your NOA is not available when you file your application, please submit it as soon as you receive it.)
5. All forms must be mailed to St. Mary's Academy or dropped off to St. Mary's Academy's Reception office.

Attention: Nadine Dannenberg  
St. Mary's Academy  
550 Wellington Crescent  
Winnipeg, MB R3M 0C1
6. Please email any questions to [bursary@smamb.ca](mailto:bursary@smamb.ca) or call Nadine Dannenberg at (204) 478-6048

## 1. Identification of students attending SMA in 2023-2024

### First Daughter

Name \_\_\_\_\_  
Last Name \_\_\_\_\_ First \_\_\_\_\_

Address \_\_\_\_\_  
Street \_\_\_\_\_ City, Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Lives with \_\_\_\_\_ Grade in September 2023 \_\_\_\_\_

### Second Daughter

Name \_\_\_\_\_  
Last Name \_\_\_\_\_ First \_\_\_\_\_

Address \_\_\_\_\_  
(if different from 1<sup>st</sup> student) Street \_\_\_\_\_ City, Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Lives with \_\_\_\_\_ Grade in September 2023 \_\_\_\_\_

### Third Daughter

Name \_\_\_\_\_  
Last Name \_\_\_\_\_ First \_\_\_\_\_

Address \_\_\_\_\_  
(if different from 1<sup>st</sup> student) Street \_\_\_\_\_ City, Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Lives with \_\_\_\_\_ Grade in September 2023 \_\_\_\_\_

## 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		<input type="checkbox"/> Same as above	
	If different from student(s)		If different from student(s)	
Street	_____		_____	
City	_____		_____	
Postal Code	_____		_____	

**3. Other 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 2022 Actual	Mother/Guardian 1 2023 Estimate	Father/Guardian 2 2022 Actual	Father/Guardian 2 2023 Estimate
Total Income (line 150)				
Net Income (line 236)				
Taxable Income (line 260)				
Tax Payable (line 435)				
Taxable Dividends (line 120)				
Taxable Capital Gains (line 127)				

**5. Explanation of any significant differences between 2022 actual amounts and 2023 estimates.**

**6. Other Non-Taxable Income**

	Annual Amount	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 2022 \$ \_\_\_\_\_

Student is attending SMA’s Extended School Experience trip in 2023-2024 Germany Peru

Student will be a member of 2023-2024 SMA PREP hockey team Yes No

Athletic/Extra-curricular fees paid in 2023 \$ \_\_\_\_\_

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	\$	\$
<b>TOTAL</b>	\$	\$

**Vehicles, Boats, Recreational Vehicles, Trailers – Purchased/Leased**

Make / Model / Vehicle Year	Purchased or Leased	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. Payee - If tuition will be paid by more than one payee, please identify the split.**

	% 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.

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Signature of Parent/Legal Guardian

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Signature of Parent/Legal Guardian

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Name of Parent/Legal Guardian

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Name of Parent/Legal Guardian

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Date (mm/dd/yyyy)

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Date (mm/dd/yyyy)

### APPLICATION DUE MAY 1, 2023

- A copy of all information slips (T4, T4A, T3, T5, etc.) for 2022
- A copy of your income tax returns (T1) for the year 2022
- If you have *rental income*, please enclose **Schedule T776**
- If you are *self-employed*, please provide a **Statement of Business/Professional Activities T2125**
- If you have a *Corporation*, please provide the **T2 - Corporate Tax Return**

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- A copy of your Canada Revenue Agency Notices of Assessment (NOA) for 2022. (If your NOA is not available when you file your bursary application, please submit it as soon as you receive it.)

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 1<sup>st</sup> regardless of your tax filing deadline with CRA. Applications submitted after the deadline may not be accepted.