



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 2024-2025

Submission deadline - May 1, 2024

St. Mary's Academy is dedicated to assisting students who qualify but cannot afford an Academy education.

Bursaries are awarded on the basis of

- a. The financial need of the applicant's family;
- b. The number of students requesting a bursary;
- c. The amount of bursary funds available

A bursary **will not** be granted to cover the full cost of tuition. All families are required to pay the \$600 non-refundable registration fee. If a bursary application is accepted, the award will range from \$500 to the net tuition amount owing after the \$600 registration fee has been paid.

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.

Families are required to re-apply for a bursary every year to ensure their financial information is up-to-date. Although SMA strives to provide the same level of support each year, it cannot be guaranteed as an applicant's financial needs are assessed and compared to the financial needs of other applicants in a given year.

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 **only one application** regardless of the number of students attending SMA. If, however, parents are unmarried and are splitting tuition, each parent may apply for a bursary for their portion of tuition.
2. Unless there is a legal document specifying that one parent/guardian is responsible for the full tuition, both parents/legal 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 **2023** documents are enclosed for all parent(s)/guardian(s):
 - a. A copy of all information slips (ex: T4, T4A, T3, T5, etc.) for 2023
 - b. A copy of your income tax returns (T1) for the year 2023
 - 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. A copy of your Canada Revenue Agency Notices of Assessment (NOA) for 2023
If your NOA is not available when you file your application, please submit it as soon as possible.
5. All forms must be mailed to St. Mary's Academy or dropped off to St. Mary's Academy's Reception Office.

Attention: Leah Boughen
St. Mary's Academy
550 Wellington Crescent
Winnipeg, MB R3M 0C1

6. Please email any questions to bursary@smamb.ca or call Leah Boughen at (204) 478-6030.

1. SMA Student Identification

First Student attending SMA

Name _____
Last Name _____ First Name _____

Address _____
Street _____ City, Province _____ Postal Code _____

Lives with _____ Grade in September 2024 _____

Second Student attending SMA

Name _____
Last Name _____ First Name _____

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

Lives with _____ Grade in September 2024 _____

Third Student attending SMA

Name _____
Last Name _____ First Name _____

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

Lives with _____ Grade in September 2024 _____

2. Parental/Guardian Identification

Mother/Guardian 1

Father/Guardian 2

Name _____
Last Name _____ First Name _____ Last Name _____ First Name _____

Phone Number _____

Email Address _____

Relationship to Student _____

Occupation _____

Employer _____

Address Same as above 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	School	Grade (current)	Tuition
				\$
				\$
				\$
				\$
				\$

4. Income As Reported on Income Tax Return

	Mother/Guardian 1 2023 Actual	Mother/Guardian 1 2024 Estimate	Father/Guardian 2 2023 Actual	Father/Guardian 2 2024 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 2023 actual amounts and 2024 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 members are beneficiaries \$ _____
 If you send money overseas, how much money do you send overseas annually? \$ _____
 Athletic/extra-curricular fees paid in 2023 \$ _____
 Athletic/extra-curricular fees expected in 2024 \$ _____
 Student was selected for an SMA Extended School Experience trip in '24-'25 Yes No
 Student will be a member of the '24-'25 SMA PREP hockey team Yes No
 Amount in Registered Educational Savings Plans (RESP) - report total amount \$ _____
 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 – 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.

Signature of Mother /Legal Guardian 1

Signature of Father/Legal Guardian 2

Name of Mother/Legal Guardian 1

Name of Father/Legal Guardian 2

Date (mm/dd/yyyy)

Date (mm/dd/yyyy)

APPLICATION DUE MAY 1, 2024

Documents enclosed:

- A copy of all information slips (T4, T4A, T3, T5, etc.) for 2023
 - A copy of your income tax returns (T1) for the year 2023
 - 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**
- (The schedules refer to the detail pages, not the summary)**
- A copy of your Canada Revenue Agency Notices of Assessment (NOA) for 2023. If your NOA is not available when you file your bursary application, please submit it once it becomes available.

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.