

**CSEA EDUCATION FOUNDATION SCHOLARSHIP APPLICATION FORM S-1**  
**For California Residents Not Currently or Previously Licensed as Enrolled Agents**

The primary purpose of the CSEA Education Foundation Scholarship Program is to foster, improve and provide access to tax-related information and services available to the general public through education programs and scholarships aimed at increasing the knowledge of current Enrolled Agents and potential Enrolled Agent candidates. **This application is for non-EAs who are considering an Enrolled Agent career.** If you are an Enrolled Agent and seeking a scholarship to expand your professional knowledge, please request Form S-2.

**PLEASE TYPE OR PRINT CLEARLY**

**Section A: General Information**

Name \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ St \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_ Are you a California Resident? \_\_\_ Yes \_\_\_ No  
 Email Address \_\_\_\_\_

**Section B: Professional Status**

\_\_\_ CPA \_\_\_\_\_ Tax Attorney \_\_\_\_\_ CTEC Registered Tax Professional  
 \_\_\_ Student - List venue and course of study: \_\_\_\_\_  
 \_\_\_ Other (describe) \_\_\_\_\_

**Section C: Applicant's Statement**

Please attach a separate statement, no more than two pages in length, with your answers to the following questions (please follow this format/question order when responding):

- 1) What are your specific educational goals?
- 2) What are your career and professional goals?
- 3) Please describe your volunteer or community involvement.
- 4) How would the award of a scholarship financially help you pursue your career as an EA?
- 5) Please answer the following question in your own words, "What is an Enrolled Agent?"
- 6) What additional information do you feel may be helpful to us in evaluating your application?

**Section D: Course Information (SEE class or other course in the field of taxation, finance, and accounting)**

Name of Course	Date(s)	Provider Name	Tuition	Books	Total
**Complete section below for provider information					
<b>TOTAL REQUEST</b>					

\*\* Education Provider \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Course Title/Description \_\_\_\_\_  
 How did you hear about the CSEA Education Foundation and its scholarship program? \_\_\_\_\_

Have you applied for, or been awarded, a scholarship from any other source for the education covered in this application? \_\_\_ YES \_\_\_ NO If yes, from what source? \_\_\_\_\_

**Section E: Additional Information**

- 1) Three personal letters of recommendation must accompany your application. If you are applying for reimbursement for a prior class, one of the letters must be from the class's instructor and you must include a verification of completion of course. Reimbursement scholarships are only awarded within 12 months of the final date of the class.
- 2) Include a copy of the Education Provider's class brochure or a detailed class description.
- 3) Submit this application to the CSEA Education Foundation Scholarship Committee, 3200 Ramos Circle, Sacramento, CA 95827-2513. Scholarships are awarded up to four times annually; your application will be considered on a timely basis and you will be notified within four months of receipt of this application by the Committee.
- 4) Notification will be mailed to the address shown on this application. Scholarships are made payable to the Education Provider; if already paid, you must present a copy of the paid receipt for direct reimbursement.
- 5) All decisions of the CSEA Education Foundation are final.

**I CERTIFY THAT ALL STATEMENTS CONTAINED IN THIS APPLICATION ARE TRUE TO THE BEST OF MY KNOWLEDGE AND BELIEF. I UNDERSTAND THAT FALSIFICATION OF THE INFORMATION CONTAINED HEREIN WILL VOID THIS APPLICATION AND DISQUALIFY ME FROM RECEIVING CSEA EDUCATION FOUNDATION SCHOLARSHIPS.**

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_ (Rev. 4/10)

## THE CSEA EDUCATION FOUNDATION

Established in 1984 by outgoing President Nancy Nesbitt, EA, the Scholarship Fund has awarded tens of thousands of dollars to worthy students to assist them with their education, particularly to promote the Enrolled Agent profession as a career choice.

## ABOUT THE SCHOLARSHIP FUND

# SCHOLARSHIP APPLICATION

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In January 2008, the CSEA Education Foundation was formed as a 501(c)(3) entity, and thereafter awarded a total of more than \$7,000 to 15 students; over the past seven years, more than \$115,000 has been awarded to 262 deserving students.

Scholarship Awards are funded through the generosity of personal donors and by sponsors, donors, and bidders of the Society's annual Scholarship Auction. With the establishment of the new California Society of Enrolled Agents Education Foundation, Inc., donations to the Foundation's Scholarship Fund are now tax deductible.

### PRIMARY PURPOSE OF THE CSEA EDUCATION FOUNDATION SCHOLARSHIP COMMITTEE

To foster, improve and provide access to tax-related information and services available to the general public through education programs and scholarships aimed at increasing the knowledge of current Enrolled Agents and potential Enrolled Agent candidates.

### WHO IS ELIGIBLE?

The CSEA Education Foundation currently recognizes and awards two classifications of scholarship recipients to California residents:

1. Persons aspiring to become Enrolled Agents. **Form S-1**
2. Current EAs who wish to broaden their knowledge in the field of taxation. (Scholarships are not awarded for courses necessary to maintain Continuing Professional Education hour requirements, but are intended for courses that expand the fields of knowledge and expertise.) **Form S-2**

### WHAT CLASSES QUALIFY?

**For those aspiring to become Enrolled Agents:** Tuition, including registration fees and books, for courses in the field of taxation, finance or accounting. This includes SEE (Special Enrollment Examination) courses.

**For those who are currently or previously Enrolled Agents:** Tuition, including registration fees and books, for courses in the field of taxation, finance and accounting. This is not for courses to maintain your Continuing Professional Education hour requirements. Examples of courses that do qualify include Tax Court, NTPI, C-STAR, etc.

For additional information, please call the CSEA Education Foundation at 916/366-6646.