

**Criteria:**

Applicants must have an active account at SDCU in good standing for 6 months prior to applying. Applicants must be 18 or older, must be attending or have attended an accredited college or post-secondary program during the current calendar year. Applicants must be able to demonstrate financial need. Applicants are required to write 2 essays:

- 1) 100 Words: How do you know that your education will align with employment opportunities?
- 2) 250 Words: How might those employment opportunities allow you to stay connected in the Okanagan region?

**Submission Deadlines:**

Applications must be returned on or before **December 1st**. Please submit this application along with proof of registration and your essay to: **Summerland Credit Union, Attn: Bursary Committee Box 750 Summerland BC V0H 1Z0**. If you have any questions please contact Sandy Laidman at 250-494-6052 or slaidman@sdcu.com.

**\*\* Late submissions will not be considered \*\***

**Disbursement of Awards:**

Once a selection has been made the recipient will be notified. As required by Revenue Canada, T4A's will be mailed the following February.

**Applicant's Statement**

**Freedom of Information and Protection of Privacy** - If granted an award I authorize Summerland Credit Union to release pertinent information to government bodies and my educational institute.

*Note: The Summerland Credit Union will request a photo of each recipient for marketing purposes.*

I declare that the information provided herein is true and correct. I understand the information provided on this application is subject to verification and I authorize Summerland Credit Union to make inquiries and obtain reports for that purpose.

**Signature:**

**Important:** Incomplete applications will not be accepted

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_ Initial: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ PC: \_\_\_\_\_

Phone No: \_\_\_\_\_

Cell No: \_\_\_\_\_

E Mail Address: \_\_\_\_\_

**Credit Union Information:**

Member Account No: \_\_\_\_\_

How Long: \_\_\_\_\_

Have you been sponsored by Summerland Credit Union Before? If Yes, please provide information below: Year: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Volunteer Work: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Would you like us to contact you regarding the following:**

- I am interested in sitting on SDCUs' Corporate Social Responsibility Committee
- What insurance options should I consider while away from home?
- How do I manage my account while I am away from home ie: budget; financial planning; student loan...
- I would like to know more about: \_\_\_\_\_

**Date:** \_\_\_\_\_

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**Personal Data:**

**Marital Status:**  Single  Single Parent  Married (includes common-law)  
Spouse's Occupation: \_\_\_\_\_ Household Income: \$ \_\_\_\_\_

**No. Of Dependents:** \_\_\_\_\_ **Ages:** \_\_\_\_\_

**Employment History:**

Company/Employer's Name	Occupation	Dates of Employment
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Current Employment:**

Will you be employed while attending school?  No  Yes  Fulltime  Part-time  
If yes, where? \_\_\_\_\_ Occupation? \_\_\_\_\_

**Work/Career Goals:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Personal Circumstances:** *Information can be listed in point form.*

**Extenuating or financial issues that you feel the Directors should be aware of in considering your application:**  
eg: Extraordinary expenses, health, accident, family etc. (Please attach separate piece of paper if necessary)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Education:**

Post secondary education: \_\_\_\_\_ Year: \_\_\_\_\_  
(list Certificates, Diplomas/Degrees held) \_\_\_\_\_ Year: \_\_\_\_\_  
\_\_\_\_\_ Year: \_\_\_\_\_

**Current Education:**

**Enclose a copy of:**  Receipt for Registration  School printout of courses in progress  
 Full Time  Part Time

Educational Institution attending: \_\_\_\_\_  
Program you are enrolled in: \_\_\_\_\_  
Number of years left in program: \_\_\_\_\_  
Extra Courses: \_\_\_\_\_

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**Financial estimates covering the period of attendance for the current school year only**

From \_\_\_\_\_, \_\_\_\_\_ to \_\_\_\_\_, \_\_\_\_\_ which equals \_\_\_\_\_ months\*\*  
Month Year Month Year

\*\*Multiply by this number when calculating your monthly resources and expenses.

Students who are Married, common-law or single parents: must show income and expense for entire family.

**Outstanding Student Loan debt:** \$ \_\_\_\_\_

**Resources:**

Savings at the beginning of the school year: \$ \_\_\_\_\_  
Applicant's net earnings while attending school: \$ \_\_\_\_\_

**Awards:**

Scholarships \$ \_\_\_\_\_  
Bursaries \_\_\_\_\_  
Grants, research funds etc: \_\_\_\_\_  
**Total Awards** \$ \_\_\_\_\_

**Contributions:**

Spouse's net income \$ \_\_\_\_\_  
Parental or other \_\_\_\_\_  
Support payments/alimony \_\_\_\_\_  
**Total Contributions** \$ \_\_\_\_\_

**Sponsor/Government Income:**

TAC, WCB \$ \_\_\_\_\_  
Ministry Human Resources \_\_\_\_\_  
Daycare Subsidy \_\_\_\_\_  
Canadian Child Benefit \_\_\_\_\_  
GST / HST \_\_\_\_\_  
BC Climate Action Rebate \_\_\_\_\_  
Employment Insurance \_\_\_\_\_  
Band Funding \_\_\_\_\_  
Rehabilitation Funding \_\_\_\_\_  
**Total Sponsor/Government** \$ \_\_\_\_\_

**Other Income**

RESPs / RRSPs \$ \_\_\_\_\_  
Rental income \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
**Total Other Income** \$ \_\_\_\_\_

**Repayable loans granted for this school year**

Canada Student loan \$ \_\_\_\_\_  
BC student loan \_\_\_\_\_  
Bank or private loan \_\_\_\_\_  
Other (specify) \_\_\_\_\_  
**Total repayable loans** \$ \_\_\_\_\_

**TOTAL RESOURCES** \$ \_\_\_\_\_

**Expenses:**

**Tuition** \$ \_\_\_\_\_

Activity/Association \$ \_\_\_\_\_  
Books & Supplies \_\_\_\_\_  
Equipment & Uniforms \_\_\_\_\_

**Total Other School Costs** \$ \_\_\_\_\_

**Transportation Costs**

Public Transit \$ \_\_\_\_\_  
Fuel \_\_\_\_\_  
Car maintenance \_\_\_\_\_  
Car insurance \_\_\_\_\_  
Parking \_\_\_\_\_  
Return trip home \_\_\_\_\_

**Total Transportation Costs** \$ \_\_\_\_\_

**Shelter Costs**

Rent / Mortgage \$ \_\_\_\_\_  
Heat & Light \_\_\_\_\_  
Insurance/Property Tax \_\_\_\_\_

**Total Shelter Costs** \$ \_\_\_\_\_

**Food** \_\_\_\_\_

**Medical & Dental** \_\_\_\_\_

**Miscellaneous**

Personal Care/Entertainment \$ \_\_\_\_\_  
Phone \_\_\_\_\_  
Cable/Internet \_\_\_\_\_  
Loans: Car \_\_\_\_\_  
Mortgage \_\_\_\_\_  
Personal \_\_\_\_\_  
Credit Card Payments \_\_\_\_\_  
Day Care \_\_\_\_\_  
Less Subsidy \_\_\_\_\_

**Total Miscellaneous** \$ \_\_\_\_\_

**TOTAL EXPENSES** \$ \_\_\_\_\_

**Total Expenses** \$ \_\_\_\_\_ - **Resources** \$ \_\_\_\_\_ = **Shortfall** \$ \_\_\_\_\_

\*\*\* Please attach proof of registration and your typed essay to this application \*\*\*