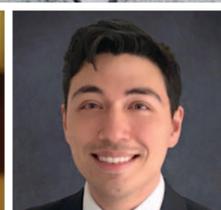


# CPA Endowment Fund of Illinois

Paving the Way for Tomorrow's CPAs

# IMPACT REPORT

April 1, 2022 - March 31, 2023



## FROM OUR CHAIR



When I was elected chairperson of the CPA Endowment Fund Board of Directors, I was thrilled. It was truly a privilege to be entrusted with expanding the reach of our invaluable programs and finding new ways to inspire and engage the next generation of CPAs.

I could never have imagined that we'd accomplish so much, so quickly. Over the past 12 months, not only have we awarded more than \$320,000 in scholarships and outreach programs, but we've continued to uncover and address barriers to success as our recipients transition into the workplace. Your investment in their future has truly motivated these hardworking, talented individuals to pursue the highly coveted CPA credential.

As you review this year's report, I hope you'll take the time to read the messages of gratitude from all the future CPAs whose lives have been touched by your generosity.

In my second term as chair, I look forward to building upon our important research findings and developing new transformational opportunities to ensure the alumni of our programs and recipients of our scholarships are able to fully realize their potential as young professionals.

Together, our generous donors light the path for those who wish to follow in our footsteps, as we work to secure a strong pipeline of CPAs and ensure the relevance of our great profession well into the future.

Sincerely,

A handwritten signature in blue ink that reads "Kimberley A. Waite". The signature is written in a cursive, flowing style.

Kimberley A. Waite, CPA  
Chairperson, CPA Endowment Fund of Illinois

# THANK YOU!

Thanks to the generosity of donors like you, we've been able to provide life-changing programs and support to hundreds of deserving aspiring CPAs. To see a glimpse of the impact of your donations, check out this short video featuring some of the amazing scholars who've benefitted from your commitment.



# PROGRAM IMPACT

Strong support this year allowed us to reach more people than ever before while continuing to offer a balance of scholarships, program content, and access to job opportunities. These scholarships and programs inspire and impact the lives of so many talented people from all walks of life, including students balancing full-time course loads with full-time jobs, those working multiple jobs, new parents, those dealing with expenses from health complications and family commitments, some coping with difficult mental health challenges, several immigrants and first-generation students (many dealing with cultural and language barriers), and more.

## WE AWARDED:

**100+**

Academic  
Scholarships

**100**

Aspiring Black CPA  
Scholarships

**70**

CPA Exam Review  
Course Scholarships

**37**

CPA Exam  
Awards

**37**

Mary T. Washington  
Wylie Scholarships

**14**

Laptop  
Scholarships

## WE SUPPORTED:

**College 'Be a CPA' Presentations (35 events)**

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**Student Influencers (20 campuses)**

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**Networking Opportunities for Aspiring CPAs**

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**Virtual Career Fair (19 employers and 77 job seekers)**

# SCHOLAR SPOTLIGHTS



“ My life has been transformed through scholarships and opportunities offered by the Illinois CPA Society. Serving as a Student Influencer has opened so many doors as I developed effective presentation skills, built meaningful relationships, and grew as a leader on my campus. It’s an incredible honor to share resources with my classmates that could have the power to change their lives, too. ”

**Peter Pendowski**  
Student Influencer

“ To save money, I started at a community college. Now that I’ve transferred schools, I’m focused on completing my degrees and sitting for the CPA exam in the next two years. Awards like this one enable me to work fewer hours and spend more of my time studying, networking, and engaging on campus. ”

**Dawson Brown**  
Academic Scholarship Recipient



“ I’m so glad I attended this event! I really appreciated the opportunity to meet with several different employers who weren’t at my school’s career fairs. These conversations helped me learn about unique workplace experiences and gave me the chance to share more about myself and my goals. I also received feedback on my resume prior to the fair, which put me at ease so I could put my best foot forward. Thank you for connecting me to great job opportunities! ”

**Michaela Magee**  
Virtual Career Fair Attendee

“ Obtaining the CPA credential is extremely important to me. I’ve come to learn that this designation can open doors and put me in a better place to succeed. As I get closer to my goal of becoming a CPA, I know I’m also setting an example and opening doors for those in my community. Thank you for believing in me! ”

**Fabian Lopez**  
CPA Exam Award Recipient



# SCHOLAR SPOTLIGHTS



“ Before I found out I was chosen for this scholarship, I was seriously questioning how I was going to afford a master’s degree on my own. This award brought a great sense of relief and has truly impacted my life by helping me finish my education. It touches my heart that individuals outside of my family are invested in my future—which is very empowering. Your support for my education means so much, and I can’t thank you enough for your generosity and confidence as I work toward obtaining my CPA credential. ”

**Vanessa Renteria**  
Academic Scholarship Recipient

“ Your team has been instrumental in helping me realize how valuable the CPA credential could be for me, even if I don’t spend my entire career in public accounting. The process to become a CPA was intimidating and confusing. Because of your support, I have a better understanding of my own timeline and strategy. Earning my CPA now feels attainable, which makes all the difference as I begin this journey. ”

**Suchita Farkiwala**  
Be a CPA Presentation Attendee



“ As I start my college career, I’m very thankful for receiving a freshman scholarship. You’ve lightened my financial burden, and your generosity has helped me focus on the most important aspect of school—learning. Your support motivates me to be an outstanding student, become a successful accountant, and achieve my dream of serving as a leader in this profession. ”

**Aisha Bawany**  
Academic Scholarship Recipient

“ I fell in love with accounting in high school at a time when I wasn’t sure I could afford the education I wanted to pursue. Receiving this scholarship has enabled me to plan for my future without the added stress of financial challenges. Because of your generosity, I’m one step closer to achieving my goals. ”

**Giovanny Bucio**  
Academic Scholarship Recipient



Endowed and expendable named funds are an invaluable investment in students and future CPAs. These funds provide powerful academic outcomes, support immediate and meaningful need, and highlight scholar successes. Establishing a named fund is a visionary and generous act that helps preserve the CPA Endowment Fund of Illinois' mission well into the future and impacts beneficiaries over many lifetimes.

**We're delighted to have the incredible support and partnership of the following named funds:**

- Arthur R. Wyatt Accounting Scholarship Fund
- Black CPA Centennial Fund\*
- Edilberto C. and Carmelita M. Ortiz & Jovencio P. and Violeta R. Mangahas Future CPA Fund
- Herman J. Neal Scholarship Fund
- James A. Sikich Visionary Scholarship Fund
- Jeanette M. Cochrane Memorial Fund\*
- Kenneth J. and Jacqueline M. Hull Accounting Scholarship Fund
- Marian Powers Accounting Scholarship Fund
- Mary T. Washington Wylie Opportunity Fund
- Needles, Snow, Wish Accounting Scholarship Fund
- Surendra and Shanta Daga CPA Scholarship Fund
- Women's Executive Committee Advancing Women in Accounting Scholarship Fund

\*Expendable Named Funds

**NAMED FUNDS**

## Mary T. Washington Wylie Opportunity Fund

### Internship Preparation Program

During the 11<sup>th</sup> annual Mary T. Washington Wylie (MTWW) Internship Preparation Program, a record high 37 participants gained important exposure to the profession, skills they need to succeed, and courage to be better versions of themselves. Each student received a \$500 scholarship and 14 of them also received a laptop scholarship. We're excited to report that nearly every participant has already accepted their first internship or full-time job because of their access to the program content and connections.



*“ Not only did this program provide great opportunities that I otherwise wouldn't have had access to, more than anything, it gave me hope that I'll find my place in the profession. For the first time since deciding to pursue a career in accounting, I felt seen and valued by my peers, recruiters, and other professionals. The knowledge and confidence I gained empowered me to take charge of my future, and I can't wait for my internship this summer. ”*

**Destini Simon**

MTWW Internship Preparation Program Participant

### Alumni Community

Beyond the three-day program, we're also proud to provide nearly 300 program alumni with various professional development trainings, networking opportunities, and more. This year, we provided 70 program alumni with scholarships for CPA exam review course materials. We also continued our incredible partnership with the University of Illinois, where we've now provided more than 40 of our program alumni with full-tuition scholarships to attend its Master of Accounting Science program.

Although many of our program alumni are successful in their jobs, we know there are some who could benefit from additional support when they enter the workforce. Using survey data and firsthand accounts, we uncovered barriers they face when entering and trying to advance in the accounting profession. Our findings have inspired us to develop additional customized training and mentorship resources.

**Check out the following reports to learn more about the program alumni and our research findings:**



[Internship Preparation Program](#)



[2022 Insight Special Feature](#)

## Marian Powers Accounting Scholarship Fund

In 2004, Marian Powers, Ph.D., and Belverd E. Needles Jr., Ph.D., CPA, CMA, established this fund to support scholarships for accounting students at Chicago State University. Through their vision and generous support, this fund has had an incredible history of helping to relieve the financial burden of pursuing an accounting degree. Over the past seven years, this fund has provided laptop scholarships for 30 diverse accounting students selected to participate in our MTWW Internship Preparation Program. These awards have offered a lifeline that not only helps them succeed in their classes, but also enables them to begin crucial internship and job searches, prepare for the CPA exam, and make other important moves to launch their accounting careers.



*“ I would like to express my sincerest appreciation for being awarded a brand-new laptop. The laptop will allow me to complete my schoolwork and studies more efficiently. Your contributions to students in the accounting field are exemplary. I look forward to continuing your efforts of progressing the profession. ”*

**Lauren Frye**  
Marian Powers Accounting Award Recipient

## Black CPA Centennial Fund

In 2021, we led a national effort to commemorate the rich history and progress Black CPAs have made in the profession over the last 100 years. Together with our partners, we honored some of the first Black CPAs, celebrated the achievements of Black CPAs, and built upon the future of the Black CPA community. We raised and disbursed \$93,500 to 100 Aspiring Black CPA Scholarship recipients. These awards, ranging from \$500-\$2,500, made an immediate, meaningful impact by alleviating financial barriers related to preparing for or taking the CPA exam.

*“ I’m not overstating when I say that this scholarship has changed me as a person. I feel more confident and more aware of what I can accomplish as a Black accountant. I have so many to thank for assisting me with the next chapter of my professional journey as I prepare to earn my CPA. ”*

**Eldrin Oatis**  
Aspiring Black CPA Scholarship Recipient



## Edilberto C. and Carmelita M. Ortiz & Jovencio P. and Violeta R. Mangahas Future CPA Fund

In addition to establishing a personal endowed scholarship fund, Edilberto C. Ortiz, CPA, CGMA has been instrumental in obtaining substantial contributions for other funds. In 2021, Mr. Ortiz and Mr. Mangahas combined funds to establish the Ortiz/Mangahas Fund to support people when they need the assistance, confidence, and motivation to overcome barriers as they pursue CPA licensure. As a tribute to the generous donors and their incredible career achievements, scholarships have already been awarded to 22 diverse and deserving CPA Exam Award recipients.



*“ My parents gave up a lot to provide me with an opportunity for a better life. However, I faced many obstacles and found myself questioning if I was good enough to even attend college. This scholarship was worth so much more than financial assistance; it gave me the confidence to not give up before I began. Your support empowered me to reach my potential and honor my parents' sacrifices. Now, I'm so proud to call myself a CPA! ”*

**Marlene Medina, CPA**  
Ortiz/Mangahas Award Recipient

## Women's Executive Committee Advancing Women in Accounting Scholarship Fund

This fund was established in 2004 by members of the Illinois CPA Society's Women's Executive Committee to support academic scholarships that reward female senior or graduate accounting students who, through their academic and extracurricular activities, have demonstrated great potential to become successful leaders in the CPA profession. Donors to this fund have made great strides in helping increase the representation of female CPA leaders by breaking down barriers and encouraging those with a high potential to lead.

*“ By investing in me, you've let me know that I'm on the right track; that the years spent balancing part-time jobs, internships, demanding course loads, and volunteer positions are paying off; that I have what it takes to earn the CPA credential and become a leader in the profession. Thank you for helping my dreams become reality! ”*

**Amanda Rizzo**  
Advancing Women in Accounting Scholarship Recipient



Annual contributions are essential to the success and sustainability of our initiatives. Even in the face of continuing economic uncertainty, we maintained strong donor support and exceeded budgets in all fundraising areas.

In case you missed it, this list of more than 1,040 donors was also published in the Illinois CPA Society's spring 2023 issue of Insight magazine.

## President's Pavers (April 1, 2022 - March 31, 2023)

### \$20,000

Illinois CPA Society  
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### \$10,000

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