

CPA Endowment Fund of Illinois

Paving the Way for Tomorrow's CPAs

impact report

April 1, 2021 - March 31, 2022



INSPIRE > SUPPORT > REWARD

www.icpas.org/annualfund

FROM OUR CHAIR



Far too often, events that occur in our cities, country, and world can drain our spirit and the hope for a better future. Although we can't fix everything that needs to be fixed, we're grateful to be able to provide a ladder up to those who need it and have the potential to positively contribute to our profession. The CPA Endowment Fund of Illinois, the charitable partner of the Illinois CPA Society, is grateful for the generous financial contributions of our donors, the time and expertise of our volunteers, and the ability to support more future CPAs than ever before.

It has been an honor to oversee such a successful year, awarding \$250,000 in scholarship and training programs, and positively impacting the lives of more than 275 diverse and deserving scholars across the state. We want to share that very same gratitude with you as we reflect on a year we can be proud of.

Together, we're making an impact—not just on the future of the CPA profession but on our communities. Together, we're providing hope. Together, we're changing lives. We encourage you to continue reading to learn more about what we've accomplished this year with your support.

On behalf of all current and future CPAs impacted by your support, thank you for your continued generosity, dedication, and passion.

Sincerely,

A handwritten signature in blue ink that reads "Howard Blumstein". The signature is fluid and cursive, with the first name and last name clearly distinguishable.

Howard Blumstein, CPA
2021-22 Chairperson

THANK YOU!

Thanks to donors like you, deserving scholars continue to benefit from our life-changing programs and support. **But we'll let them tell you for themselves. Watch this short video:**



PROGRAM IMPACT

Our programs were incredibly strong this year, providing a variety of initiatives that supported hundreds of accounting students and professionals aspiring to earn the CPA credential.

WE AWARDED:

100+

academic
scholarships

42

CPA exam
awards

25

laptop
scholarships

35

Mary T. Washington
Wylie Scholarships

WE SUPPORTED:

Student Ambassadors

20 colleges and universities represented

“Be a CPA” Presentations

500 students reached at 36 colleges

Career Development Webinars

70 attendees participated

Virtual Career Fair

176 job seekers connected to 21 employers

Through these programs, we inspired and impacted the lives of so many talented scholars: students balancing full-time jobs, school, and family commitments; new parents; those dealing with expenses from health complications; immigrants and first-generation students; those working multiple jobs; and more.

SCHOLAR SPOTLIGHTS



"I feel truly blessed to have received this scholarship. While furthering my education is a priority for me, it is not cheap. The potential of graduating and beginning my career under the burden of debt has certainly caused anxiety for me, as I have seen friends and family struggle to get their feet on the ground. This award has lessened that burden and will allow me to focus on my path to a CPA license in Illinois. The future is bright for me, and that is largely thanks to this scholarship."

Zachary Curry

Academic Scholarship Recipient



"Receiving your Freshman Scholarship has greatly lessened the financial burden on my family during my first year as an accounting major at Illinois State University. Without the additional concern of paying for college, I can focus on my education and development. This award also gave me the confidence to attend your Internship Preparation Program, where I gained important skills and connections in the accounting industry. I know how important it is to grow my interpersonal and networking capabilities as an honors student and I could not do this without your help."

Joshua Thompson

Academic Scholarship Recipient



"I am beyond honored to be selected as a recipient of the CPA Exam Award. In challenging times, it is hard to balance everyday financial needs with the desire to pursue my passion for learning. This award was a huge motivation for me as I can worry less and concentrate more on preparing for the exams. My lifetime dream of becoming a CPA is coming true, and your support helped me get here."

Tiffany Lee

CPA Exam Award Recipient

SCHOLAR SPOTLIGHTS



"Attending your Virtual Career Fair was one of the best decisions I have made. During the event, I was able to hop from room to room and speak with several employers, many of which I would have never had access to otherwise. I appreciated the opportunity to better understand the culture and what it would be like as an intern at each firm. After my initial introduction during the event, I applied to a position and heard back within a week that I was advancing to the first round of interviews. Thanks to your Virtual Career Fair, I was able to secure an audit internship for the summer!"

Jack Blitstein

Virtual Career Fair Attendee

"Your resources empowered me, inspired me to continue my education, and influenced my decision to pursue the CPA credential. I truly appreciate your contribution to my growth."

Megan Lockhart

Academic Scholarship Recipient



"I am so thankful to have received a Laptop Award. With this support, I have been able to focus on my academic and career paths without the stressor of having to share with my roommate or find an open computer lab. Opportunities such as this one mean so much to me, as they work towards minimizing educational inequalities. This award has allowed me to experience a more fulfilling education."

Abby Carbajal

Laptop Award 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 for the incredible support and partnership from the following named funds:

Arthur R. Wyatt Accounting Scholarship Fund

Black CPA Centennial Fund*

Debra R. Hopkins "Be a CPA" Scholarship Fund*

Edilberto C. and Carmelita M. Ortiz & Jovencio P. and Violeta R. Mangahas CPA Scholarship 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

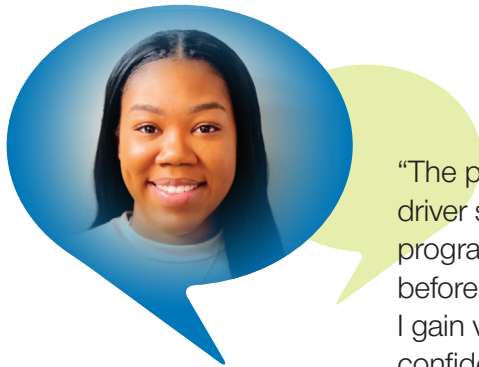


FUND SPOTLIGHTS

Mary T. Washington Wylie Opportunity Fund

We held the 10th annual Mary T. Washington Wylie Internship Preparation Program in January. This year, we were able to expand the program to accept 29 impressive students from the strong applicant pool. In addition to a \$500 scholarship, the participants gained important exposure to the profession, learned the skills they need to succeed, and gained the courage to be better versions of themselves. On the final day of the three-day program, the students performed phenomenally in their interviews with our participating employers. The best news is that every participant from this year's program has already received and accepted their first internship or full-time job offer as a result of having access to this specialized program and the invaluable interviews it facilitates. This program has been tremendously successful at providing scholarships to students in need, affording them access to unique opportunities, and placing them into the workforce.

We're also proud to provide all 260 program alumni with resources beyond the three-day program. In addition to various training and networking opportunities, this year we provided 20 alumni who are preparing to take the CPA exam with scholarships for CPA exam review course materials. We also continued our partnership with the University of Illinois to offer our program alumni exclusive full-tuition scholarships to attend their Master of Accounting Science program. Over the last four years, 40 of our program alumni received this opportunity.



"The program helped me embrace the idea that I'm in the driver seat when it comes to my career. After help from dedicated program volunteers, my resume is much stronger than it was before, and I know that I have the potential to keep growing as I gain valuable career experience. Everything I learned, and the confidence I gained, empowered me to ace my interviews, and ultimately, I landed my first internship!"

Shyrice Howell

Mary T. Washington Wylie Scholar

To learn more about Mary T. Washington Wylie and the success of this life-changing fund, explore the program overview and impact report [here](#):



Internship Preparation Program

Needles, Snow, Wish Accounting Scholarship Fund

One of our first endowed named funds was created by Belverd Needles Jr., William Snow, and Ernest Wish, in partnership with DePaul University, an institution that holds great meaning for them. Through their vision, generous support, and confidence in the stewardship of their investment about 20 years ago, this fund has had an incredible history of assisting many accounting students in enjoying the benefits of a DePaul education, without the financial burdens that can impede development in the early stages of their careers. This fund has experienced growth and long-term stability over the years, and this fiscal year it distributed a record \$32,000 to be matched and awarded by DePaul.

“This prestigious scholarship means everything to me. Without it, I wouldn’t be able to continue my path toward a degree. This financial support allows me to focus on my studies and seek out internships to gain professional experience. I want the donors of this fund to know they’ve invested in my dreams to help companies with their accounting and finance needs. This scholarship isn’t just impacting me—it’ll also be the reason for all I can offer in the future to clients.”

Miriam Ahmed

Needles, Snow, Wish Accounting Scholarship Recipient



Surendra and Shanta Daga CPA Scholarship Fund

In 2021, Surendra and Shanta Daga made a generous donation to establish this fund to inspire accounting students and professionals with an additional boost of confidence as they strive to fulfill their dreams of becoming licensed CPAs. We feel privileged to enter this partnership, which will allow us to support additional CPA Exam Awards, prioritizing these scholarships for people from underrepresented communities who demonstrate financial need and/or other special circumstances.

Debra R. Hopkins “Be a CPA” Scholarship Fund

Debra R. Hopkins, CPA, (1951-2014) was an acclaimed author, esteemed professor, respected leader, and true champion of the accounting profession. Debra's family created this fund to continue her legacy of helping others earn the CPA credential. More than \$62,000 was raised for this fund, which proudly supported 91 aspiring CPAs in her memory by providing them with the financial assistance, confidence, and motivation to overcome barriers they faced as they pursued their CPA licensure. This year, we awarded the balance of the fund to the recipients.

Black CPA Centennial Fund

In 2021, we were honored to partner with the American Institute of Certified Public Accountants, Diverse Organization of Firms, National Association of Black Accountants, and National Society of Black CPAs to bring forward an important national centennial celebration. The year-long initiative commemorated the licensure of the first Black CPA and the rich history and progress Black CPAs have since made in the profession throughout the last 100 years.

Together, we supported the creation and release of two podcast episodes, six in-depth video interviews of trailblazing Black CPAs, 11 articles, a 40-Under-40 Black CPA Award program, and a live-streamed virtual celebration. This original content serves to preserve and honor the histories of some of the nation's first Black CPAs, celebrate the achievements of Black CPAs positively impacting the profession, and build on the future of the Black CPA community, including the creation of this fund.

More than \$93,000 was raised, which will be disbursed in 2022 in the form of Aspiring Black CPA Scholarships, a national scholarship designed to make an immediate, meaningful impact on the advancement of Black CPAs.



Annual contributions are essential to the success and sustainability of our initiatives. Even during a year with a great deal of economic uncertainty, we maintained strong donor support and exceeded budgets in all fundraising areas.

In case you missed it, this list of more than 1,170 donors was also published in the Illinois CPA Society's spring 2022 issue of Insight magazine.

President's Pavers (April 1, 2021 - March 31, 2022)

\$100,000

Surendra & Shanta Daga

\$65,000

Dempsey J. Travis Foundation

\$30,000

Illinois CPA Society

\$15,000

BKD Foundation
Deloitte LLP

\$10,000

American Institute of Certified
Public Accountants
Crowe LLP
Joan Moore

\$5,000

Georgia Society of CPAs
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\$2,000 - \$4,999

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Paving the Way for Tomorrow's CPAs

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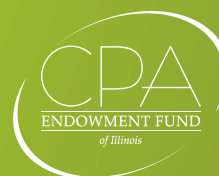
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