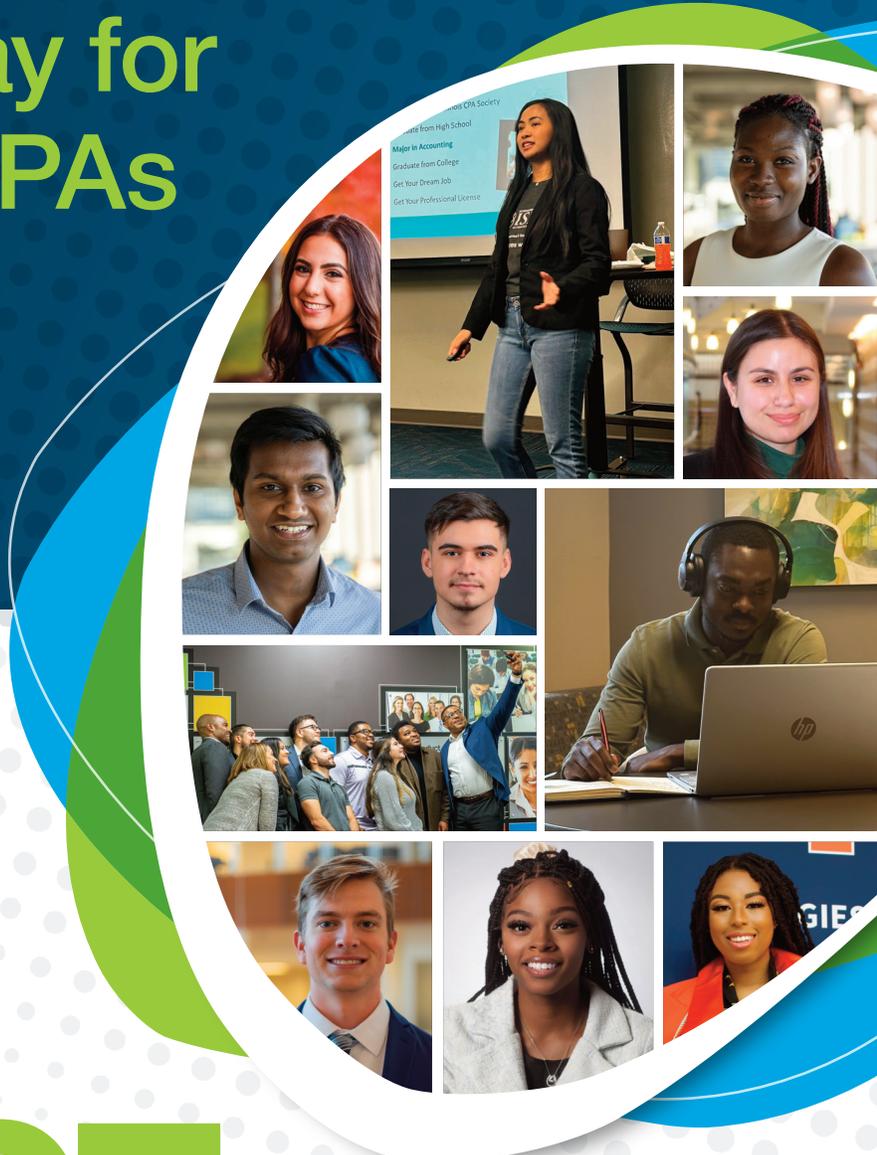


Paving the Way for Tomorrow's CPAs

CPA Endowment Fund of Illinois



IMPACT REPORT

April 1, 2023 - March 31, 2024



www.icpas.org/annualfund



FROM OUR CHAIR



For 25 years, the CPA Endowment Fund of Illinois has paved the way for tomorrow's CPAs, transforming the trajectories of countless deserving accounting students and aspiring CPAs. With each passing year, our programs have evolved, our reach has expanded, and our impact has deepened. There's so much to celebrate, all thanks to the unwavering support of our donors.

Despite mounting challenges like rising tuition and exam costs, our commitment to supporting every determined individual on their journey to becoming a CPA remains steadfast. We're actively developing resources tailored to candidates' needs, ensuring accessibility when it matters most. Our initiatives have significantly strengthened Illinois' CPA pipeline; this year we awarded more than \$260,000 in scholarships and outreach programs, with a record-high 80 CPA Exam Awards.

Our goal is clear: to ensure no CPA candidate is faced with the agonizing choice between basic necessities and exam fees, alleviating unimaginable financial fears that hinder the pursuit of the CPA credential.

Together, we're breaking down barriers, ensuring that no one is deprived of the opportunity to achieve their goal of becoming a CPA. As you peruse this year's report, I encourage you to absorb the heartfelt messages of gratitude from the very individuals whose aspirations you've helped nurture. Your investment in their futures has not only facilitated the pursuit of the CPA credential for these talented individuals but has also ignited a profound sense of purpose and determination within them.

Sincerely,

A handwritten signature in blue ink that reads "Kimberley A. Waite".

Kimberley A. Waite, CPA

2023-2024 Chairperson, CPA Endowment Fund of Illinois

THANK YOU!

Meet **Taylor Bello**

Taylor is a student at the University of Illinois at Chicago, and one of the remarkable individuals whose journey has been transformed by the generosity of others. Take a glimpse into his story and hear firsthand how your support has made a meaningful difference in his decision to major in accounting and pursue the CPA credential.



This year, our strong support allowed us to reach more than 400 future CPAs, maintaining a robust blend of scholarships, program enrichment, and access to career opportunities.

SCHOLARSHIPS AWARDED:



PROGRAM SUPPORT PROVIDED:

Conducted 40 College “Be a CPA” Presentations

Delivered 45 High School “Why Accounting?” Presentations

**Prepared 41 Mary T. Washington Wylie Internship
Prep Program Scholars**

Engaged 23 Student Influencers

Offered Resume Review Services to 104 Students

**Facilitated a Virtual Career Fair Connecting 17 Employers
with 177 Job Seekers**

Through these initiatives, we inspired and impacted the lives of diverse individuals from various backgrounds. Our impact spans students juggling full-time coursework and full-time jobs, individuals managing multiple jobs, new parents, those dealing with expenses from health complications and family obligations, immigrants, first-generation students, and many others navigating cultural and language barriers.

CPA Exam Award Scholarship Program

These scholarships, awarded to assist CPA exam candidates with any expenses related to preparing for or taking the exams (such as CPA review courses, transcript evaluation, NASBA fees, tutoring, etc.), provide crucial support precisely when candidates need it the most. Despite facing an unprecedented surge in eligible applications this year, we maximized available resources, implemented temporary solutions, and explored alternative fundraising strategies, resulting in a record number of scholarships. The tremendous success of this program reflects our commitment to nurturing aspiring CPAs throughout their personal journeys, as we continually adapt to meet the evolving needs of our applicants.



“Growing up in a small rural town, where my parents were teachers with modest incomes, pursuing a college education posed significant financial challenges. The burden of student loans weighed heavily on my goal of becoming a CPA, making it seem out of reach. However, this scholarship has been a tremendous help, showing me that my success isn’t limited by my address or economic background. Thanks to your generous support, I can now continue confidently on my path toward obtaining the CPA credential.”

Madison McBride
CPA Exam Award Recipient

“For the last five years, I was a full-time student, and any income from my part-time jobs was used to pay for tuition and basic living expenses. I needed a lot of help if I was going to be able to pass the CPA exam before I started working full-time. This scholarship was a game-changer—it allowed me the resources and time I needed to study. I found out last month that I passed my CPA exam and that wouldn’t have been possible without your support!”

Oswaldo Ruiz
CPA Exam Award Recipient



“I know I’ll be so proud of myself when I finally earn my CPA license and that every sacrifice, including the many 4 a.m. study sessions, will have been worth it. However, navigating this process has been financially draining between ongoing student loans, study materials, and exam fees. This scholarship relieved some of the financial burden while empowering me to continue on my path toward becoming a CPA. I am so thankful for the generosity of those who made it possible.”

Vivian Betouni
CPA Exam Award Recipient



High School Outreach Program

As part of our commitment to fostering interest and opportunity in the field of accounting, we've significantly expanded our outreach initiatives targeting high school students. Over the past year, we've collaborated with young professional volunteers to engage with more than 1,000 students across 45 high schools throughout Illinois. This outreach provides students with valuable insights into the profession, showcases a variety of career opportunities, and encourages students to consider accounting as a viable and rewarding path. We're proud to have awarded scholarships to 10 diverse and deserving high school seniors, providing financial assistance and encouragement to pursue their interests in accounting at the collegiate level.



“Receiving the Freshman Scholarship has been an incredible honor and opportunity for me. This scholarship not only recognizes my academic achievements but also acknowledges the unique challenges I've faced on my journey to go to college. Your belief in my potential inspires me to work harder to earn my accounting degree, make an impact in my community, and achieve my dreams as a professional.”

Alyssa Richard

Freshman Scholarship Recipient

Additionally, we've partnered with the Center for Audit Quality to integrate accounting curriculum into high school classrooms. We joined forces to co-host an exciting event at Englewood STEM High School in Chicago, celebrating the launch of “Accounting Careers: Limitless Opportunities.” This interactive course highlights the extensive benefits accounting skills can provide in business or in daily life. We're also engaging our members in their “Accounting+” nationwide storytelling campaign to attract a new generation of diverse students into the talent pipeline.



Student Influencer Program

Our Student Influencer Program is making a profound impact on the next generation of CPAs. This initiative empowers accounting students to shape vibrant communities of future CPAs on their college campus. Not only do they receive crucial financial support, training, and career development opportunities, but they also play a vital role in raising awareness of our student member benefits and providing essential resources to support their peers' accounting education and aspirations. Their leadership drives positive change on their campuses and beyond.

“I am proof of the impact of scholarships and opportunities offered by the Illinois CPA Society! In addition to the scholarship I received, serving as a Student Influencer has pushed me to grow as a leader on my campus. It's an honor to serve my classmates and provide them access to the same invaluable resources that have already given me so much.”

Liam Kirschbaum
Student Influencer



Laptop Scholarship Program

For several years now, our laptop scholarships have served as a crucial lifeline for accounting students. Many of these students rely on computer labs or public libraries, while others have laptops so outdated they can no longer support the software necessary in today's classrooms. Additionally, some students share a single computer with family members or roommates. For our laptop recipients, receiving a new laptop helps them succeed in their classes, begin their internship and job searches, and prepare for the CPA exam. Made possible through the generous support of the Marian Powers Accounting Scholarship and Mary T. Washington Wylie Opportunity Funds, these scholarships have a tangible and transformative impact on the lives of students.



“I'm in my final year at a community college, and having access to a reliable computer has allowed me to prepare for my transfer to a four-year university. It has also enabled me to explore pathways toward earning my CPA credential, participate in extracurricular activities, and actively pursue internship opportunities. This laptop scholarship has made a huge difference in my experience as an accounting student.”

Malak Jellouli
Laptop Scholarship Recipient

SCHOLAR SPOTLIGHTS



“Receiving this scholarship is a vote of confidence from women who have achieved the success that I’m striving for. I’m wholeheartedly committed to breaking through the barriers that women face in this profession. More challenges lie ahead, but with your support, I know I can overcome them and make my mark on this respected profession.”

Megan Fowler

Academic Scholarship Recipient

“This scholarship bridged the gap between my part-time income and educational expenses, allowing me to complete my bachelor’s degree, begin a master’s program, and prepare for the CPA exam. Earning my CPA isn’t just about a professional credential; it’s proof that with determination and support, a first-generation college student can carve out a place for herself in this field.”

Katherine De Zayas

Academic Scholarship Recipient



“Attending the Virtual Career Fair was a game-changer for me. I was so nervous at in-person career fairs, and this was just the opportunity I needed to make strong connections and get my foot in the door. Thanks to this experience, I received multiple job offers, and I couldn’t be more grateful for the chance to put myself out there!”

Byron Brown

Virtual Career Fair Attendee





“After attending your presentation on campus and receiving additional customized support, I feel like I have a clearer understanding of the steps needed to achieve my goal of becoming a CPA. Your guidance has given me the confidence to navigate the complexities of this process, and I’m more determined than ever to pursue this goal!”

Ronish Sangachhe
“Be a CPA” Presentation Attendee

“As a first-generation college student, being awarded this scholarship motivates me to complete my bachelor’s degree and make my family proud. With high hopes for a successful career in public accounting, your belief in me makes the journey to obtaining my CPA and developing as a leader feel possible.”

Michael Klazura
Academic Scholarship Recipient



“Receiving this scholarship opened doors beyond financial support—it validated my hard work and dedication and it relieved some of the time pressure of pursuing my CPA. Because of this opportunity, I can focus more on my studies and CPA exam prep without worrying about working extra hours to pay for my education.”

Maryam Khan
Academic Scholarship Recipient



NAMED FUNDS

Endowed and expendable named funds remain a cornerstone investment in students and future CPAs. These funds continue to yield significant academic achievements, support immediate and meaningful need, and celebrate scholar successes. Establishing a named fund stands as a visionary and generous gesture, ensuring the longevity of the CPA Endowment Fund of Illinois' mission while leaving a lasting impact on countless beneficiaries.

We're immensely grateful for the incredible support and partnership of the following named funds:

- Arthur R. Wyatt Accounting Scholarship 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 Fund

Mary T. Washington Wylie (MTWW) Opportunity Fund

Internship Preparation Program

During the 12th annual MTWW Internship Preparation Program, a record high of 41 participants each received a \$500 scholarship. Thanks to the program’s content and networking opportunities, many participants have secured their first internship or full-time job. Beyond job placement, participants gained important exposure to the profession, skills they need to succeed, and the confidence to strive for personal growth.



“In just three days, my life trajectory changed drastically. I formed crucial connections with recruiters and professionals, learned helpful tips to present myself effectively, and gained invaluable insight into the world of accounting. Not only did I build a foundation of skills that will prepare me for success in my upcoming internship, but more importantly, I established a support system of mentors and peers to lean on throughout my career.”

Greg Collins

MTWW Internship Preparation Program Participant

Alumni Community

Beyond the three-day program, we’re proud to provide more than 300 program alumni with various professional development offerings, networking opportunities, and more. Through our incredible collaboration with the University of Illinois, we’ve now granted full-tuition scholarships to more than 40 of our Internship Preparation Program alumni for its Master of Accounting Science program.

NEW! Fellows Program

Although many of our Internship Preparation Program alumni are successful in their jobs, we recognize there are some who face hurdles upon entering the workforce. Last year, we conducted research to [illustrate the barriers](#) our program alumni face when entering and advancing in the accounting profession. Our findings inspired us to launch the MTWW Fellows Program, where we supported 10 Internship Preparation Program alumni. Tailored to the needs of its participants, this initiative offers personalized guidance and support to help them transition into the workforce, have a positive professional experience, succeed in their job responsibilities, and advance in their careers.

“While my employer provides training, this program offered ongoing support crucial for my confidence during the transition into the workforce. Whether it was addressing challenges or celebrating achievements, the encouragement from program mentors and my peers was appreciated. With this added advice and guidance, I feel empowered to take charge of my own career.”

Arameli Banuelos

MTWW Fellows Program Participant



Annual contributions are essential to the ongoing success and sustainability of our initiatives. Even in the face of continuing economic uncertainty, we are grateful for the steadfast support of our generous donors. In case you missed it, the names of more than 1,070 donors were featured in the Illinois CPA Society's spring 2024 issue of Insight magazine.

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\$45,000

Dempsey J. Travis Foundation

\$20,000

Illinois CPA Society

\$15,000

PricewaterhouseCoopers LLP

\$10,000

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\$5,000

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\$2,000 - \$4,999

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