

Paving the Way for Tomorrow's CPAs

CPA Endowment Fund of Illinois

Impact Report

April 1, 2024 - March 31, 2025

www.icpas.org/annualfund



FROM OUR CHAIR



Dear Friends and Supporters,

Becoming a CPA is more than a professional milestone—it's a turning point that can change the course of someone's life. But for many, the time and cost of reaching that goal can be overwhelming, making it feel just out of reach.

I know what that feels like. At a pivotal moment in my own journey, a scholarship from the CPA Endowment Fund of Illinois made all the difference. It covered my exam fees, gave me the space to focus on studying, and reminded me that others out there believed in me. That assistance helped launch my career—and the generosity behind it stayed with me. It's a big reason I'm proud to now serve as chairperson of this incredible organization and to have the privilege of paying that support forward while advocating for those following a similar path.

Over the past year, thanks to donors like you, the Fund awarded more than \$315,000 through scholarships and outreach programs, including a record 101 CPA Exam Awards! But beyond the numbers, these efforts represent real opportunities for first-generation college students building their futures, career changers pursuing new directions, and determined CPA candidates striving to reach their full potential.

As you read this report, I hope you see just how much your investment means. It's opening doors, lifting burdens, and helping people move forward with confidence and purpose.

Thank you for making this kind of impact possible.

Sincerely,

A handwritten signature in blue ink, reading "Jason Parish". The signature is fluid and cursive, with a large loop at the end.

Jason Parish, CPA

Chairperson, CPA Endowment Fund of Illinois
Tax Partner, Plante Moran PLLC

Thank You!

Meet

Odalys “Ody” Ochoa

Ody, a student at Lewis University, is proof of the life-changing impact of your generosity. With your support she found the confidence and resources to pursue her passion for accounting and set her sights on earning the CPA credential. Hear her story and see how your contributions are shaping the next generation of accounting professionals.



Thanks to your continued commitment, we expanded our reach and deepened our impact this year, supporting more than **500 future CPAs** with a well-rounded mix of financial assistance, professional development, and meaningful career-building opportunities.

Scholarships Awarded:



Program Support Provided:

Delivered 95 “Why Accounting?” Presentations at High Schools

Led 50 “Be a CPA” Presentations at Colleges

Offered Individualized Guidance to 43 Students During Future CPA Office Hours

Prepared 49 Mary T. Washington Wylie Internship Prep Program Scholars

Engaged 29 Illinois CPA Society Student Influencers

Reviewed Resumes for 118 Students

Facilitated a Virtual Career Fair Connecting 197 Job Seekers with 10 Employers

Equipped 23 Mary T. Washington Wylie Fellows with Tools for Career Success

Through these initiatives, we’re empowering individuals from a wide range of backgrounds, each facing unique challenges on their path to becoming CPAs. Our impact reaches students balancing full-time coursework and jobs, first-generation college students, and those navigating financial stress, health issues, family obligations, or language barriers. Together, by expanding access and providing critical assistance, we’re making the path to becoming a CPA more attainable for all.

NEW! Community College Scholarship Program

In 2024, we developed a Community College Scholarship Program to address a critical gap in the CPA pipeline. This new initiative was inspired and made possible by Kenton J. Klaus, CPA, board member and senior instructor at DePaul University, whose generous lead gift and vision for supporting students at two-year colleges helped bring the program to life. Two-year colleges are a vital entry point into the accounting profession, yet many students face financial hurdles that can derail their progress.

This scholarship will provide up to \$5,000 per recipient to help students complete their second year of community college and successfully transfer to a four-year institution. Recipients will be selected based on academic achievement, financial need, and a demonstrated commitment to continuing their education in accounting. By investing in students at this early and formative stage, we're increasing access and opportunity into the profession.

High School Outreach Program

This year, we significantly expanded our high school outreach, connecting with more than 1,700 students at over 40 schools. With a refreshed approach and a well-trained volunteer base, young professional volunteers shared their experiences and guidance, introducing students to the possibilities within accounting and the real-world impact of CPAs. We broadened our reach through new and strengthened collaborations—developing relationships with two school districts and partnering with firms on student-focused events. These connections helped us reach thousands more students and created opportunities for deeper engagement with educators and employers.

To further support students' ambitions, we proudly awarded scholarships to nine outstanding high school seniors, helping them take their first steps toward a career in accounting. Through these efforts, we're helping tell a better story about what it means to be an accountant—ensuring that talented students see accounting as a viable, rewarding, and realistic career choice.



“For a long time, I wasn't sure if college was in the cards. With one sibling already enrolled, I saw how much stress it can put on a family. Learning about accounting helped me figure out what I want to do, and this scholarship made it possible to pursue it. Now I'm studying with a purpose and a plan, focused on building a better future—not just for myself, but for my family.”

Monique Hart
Freshman Scholarship Recipient

Accounting Educator Engagement

To support future CPAs, we also invest in the professors who teach them. In 2024, we hosted our first Educators Conference in over a decade, bringing together 70+ accounting faculty to explore emerging trends, exchange innovative teaching strategies, and discuss CPA exam integration and pathways to licensure. We also held our annual Accounting Department Chairs Meeting, with 11 schools represented. These efforts reflect our deep commitment to fostering a pro-CPA culture on campus through a growing network of academic champions.

CPA Exam Award Scholarship Program

These scholarships provide essential support at one of the most pivotal—and financially burdensome—points on the path to becoming a CPA. Unlike tuition, many CPA exam-related costs—like review courses, transcript evaluations, NASBA fees, and tutoring—must be paid out of pocket, often without backing from a future employer.

This past year, we responded to growing demand by expanding this program and awarding more scholarships than ever before. Through creative resource allocation and new fundraising strategies, we increased the number of recipients, yet the need continues to outpace available funding. We continue to prioritize funding for as many qualified applicants as possible, knowing how difficult it is to turn away individuals who are ready to become CPAs but face financial barriers.

As the profession evolves, so do the needs of CPA candidates. We're committed to adapting, growing, and ensuring cost is never the reason someone walks away from becoming a CPA.

“As someone who came to accounting from another field, the road to the CPA has been both exciting and difficult. At times, it's been hard to stay motivated, especially with the financial and emotional demands of the process. Receiving this scholarship gave me the lift I needed. It reminded me of why I started this journey and helped me stay focused on the finish line. More than anything, it showed me that others see potential in me—and that encouraged me to keep going.”

Stella Bang

CPA Exam Award Recipient



“Balancing work, parenting, and exam preparation is challenging on its own. Facing thousands of dollars in exam-related costs made it feel even more overwhelming. This award helped relieve that financial pressure and allowed me to focus on moving forward—both for me and my family. It's more than a scholarship—it's a reminder that there are people out there rooting for me. I'm incredibly grateful to be on the receiving end of that generosity.”

TJ Kesteleyn

CPA Exam Award Recipient

Named Funds

These funds—both endowed and expendable—are a vital investment in students and the future of the CPA profession. They provide essential support by fueling academic achievement, addressing immediate financial needs, and celebrating student success. Establishing a named fund is a meaningful, forward-thinking way to sustain the mission of the CPA Endowment Fund of Illinois while creating a lasting legacy for generations of aspiring CPAs.

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

- **Arthur R. Wyatt Accounting Scholarship Fund**
- **Edilberto C. and Carmelita M. Ortiz & Jovencio P. & Violeta R. Mangahas Future 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 Fund

Marian Powers Accounting Scholarship Fund

This fund plays a pivotal role in supporting participants of the MTWW Internship Preparation Program by awarding laptop scholarships to students selected for the program. These scholarships go far beyond providing technology—they offer independence, remove learning barriers, and allow students to fully participate in their coursework, internships, and CPA exam preparation. To date, 46 students have received a laptop through this fund, helping them pursue their goals with greater confidence and fewer limitations.



“Having a reliable laptop opened up opportunities I couldn't fully take advantage of before—now I can stay focused and engaged. My old laptop was unreliable and made it difficult to keep up with coursework and job applications. Now, I can focus on excelling academically and pursuing internships and certifications to help my chances of becoming a CPA.”

Litzy Roman-Reyes

Marian Powers Accounting Scholarship Recipient

Mary T. Washington Wylie (MTWW) Opportunity Fund

Fellows Program

Recognizing the unique challenges that early-career accounting and finance professionals often face, the Fellows Program was created to provide personalized support during this critical career transition. Designed for individuals with less than two years of full-time experience, the program offers tailored mentorship, resources, and guidance to help participants navigate the early stages of their professional journey.

The current cohort includes 23 talented individuals representing nine accounting firms and one company. Monthly touchpoints, both virtual and in-person, focus on relevant topics such as goal setting, technical training, mental health, and workplace navigation. These experiences help participants expand their networks, overcome challenges, build confidence, and take meaningful steps forward in their careers. The program reflects our ongoing commitment to creating a more inclusive profession by investing in those who are just starting on their path.



“Joining the Fellows Program was one of the best decisions I’ve made for my career. It’s helped me feel more confident about where I’m headed and has given me real guidance when I needed it most. The mentorship has helped me figure out my goals and how to actually work toward them. Plus, connecting with others who are going through the same things has reminded me I’m not alone. I feel more prepared and more motivated now to grow in my career.”

Tabish Jagshi

MTWW Fellows Program Participant

Internship Preparation Program

Now in its 13th year, this program continues to provide a strong launchpad for aspiring accountants. This year, a record 49 participants received \$500 scholarships and completed three days of intensive training, networking, and career development. Many have already secured internships, and all left the program with greater confidence, clarity, and skills to navigate the profession.

“This program provided me with an incredible foundation for my career in accounting. Through motivational speakers, interesting panels, and personalized resume and LinkedIn reviews, I gained essential skills and confidence that helped me stand out. After completing the program, I was fortunate to receive multiple internship offers. This was an invaluable opportunity for students like me, giving the resources and guidance I need to succeed.”

Jaylon Garner

MTWW Internship Preparation Program Participant



Alumni Community

Our resources don't stop after the program ends. With more than 375 alumni, we offer ongoing professional development and networking. This year included our first in-person alumni reunion since the pandemic—a powerful reminder of the program's lasting impact on launching careers and building a strong, supportive community.



Future CPA Scholarship Funds

Several of our named fund donors support the CPA Exam Award Program, recognizing the critical need for more scholarships to help candidates overcome financial barriers in their journey.

Edilberto & Carmelita Ortiz, Jovencio & Violeta Mangahas, and Surendra & Shanta Daga have made a powerful and intentional investment by designating their funds to support aspiring CPAs preparing for licensure. United in their commitment to access and opportunity, these donors are helping candidates gain resources, confidence, and momentum to pursue licensure. Together, these visionary donors are bridging the gap for those ready to take the next step—but face financial obstacles that could otherwise hold them back.



“Since I was 17, I've balanced school with part-time jobs to help my family overcome financial challenges. The struggles we faced taught me the value of persistence and education, but I knew earning my CPA was key to unlocking real stability. Preparing for the exam while working was overwhelming, but this award provided the resources and encouragement I needed to focus on my goals and build a brighter future.”

Aliyan Rizwan

Surendra & Shanta Daga CPA Scholarship Recipient

“I've always known that earning my CPA would help me grow in my career, but self-funding the process while job hunting has been overwhelming. Receiving this scholarship felt like someone lifted a weight off my shoulders. It gave me the push I needed to keep going with clarity and confidence, and reinforced that I have support behind me every step of the way.”

Maria Zuleta

Ortiz & Mangahas Future CPA Scholarship Recipient



FUND SPOTLIGHTS

ASPIRING CPA SPOTLIGHTS



“Losing my father to cancer has been one of the hardest challenges I’ve ever faced, both emotionally and financially. At times, finishing college and pursuing my CPA credential seemed impossible. But your support gave me the strength to keep going and fueled my determination to excel in my studies and prepare to begin my career. By lifting the financial burden, you’re really giving students like me the opportunity to succeed.”

Taylor O'Malley

Academic Scholarship Recipient

“Before the presentation, I felt overwhelmed by the CPA process. There’s a lot of information out there, and it’s not always easy to figure out where to begin. But during the session, things finally started to click. They broke down the requirements in a way that made sense, and I got to ask questions on the spot. I walked away with a clear plan and the confidence to take my next steps. Opportunities like this help students like me feel prepared and ready to take on the CPA exam.”

Jerryl Varughese

“Be a CPA” Presentation Attendee



“Growing up around financial struggles made me determined to change my future. When I started college, I knew I wanted to become a CPA, but I wondered, ‘How will I afford it?’ Instead of letting my worries hold me back, they pushed me to work harder. Thanks to the scholarships and opportunities you provided, I’m getting ready for the CPA exams and creating a future I can feel proud of. Thank you for believing in me and helping make this a reality.”

Martha Pierre-Louis

Academic Scholarship Recipient





“As a student still figuring out my career direction, the Virtual Career Fair opened my eyes to what's possible. I had meaningful conversations with several companies and landed interviews with firms I hadn't considered before. What really stood out was how easy it was to connect—I could explore a bunch of opportunities in one afternoon without the stress of a packed room. It helped me take a leap forward in my job search and gave me the exposure I needed to keep moving toward a career in accounting.”

Jonathan Pedroza
Virtual Career Fair Attendee

“This scholarship gave me the flexibility to focus on what matters most—my education, my internships, and my long-term goals. It helped cover tuition and materials and lifted a huge weight off my shoulders. It's also helped me grow and really see what's possible for my future. What makes this support so meaningful is knowing someone believes in me. That belief has made a big difference in how I show up—both in school and at work.”

Lauren Cerbin
Academic Scholarship Recipient



“The Student Influencer Program has helped me grow in ways I didn't expect. It's given me leadership experience, helped me build communication skills, and created opportunities to serve others on my campus. With the added support of a scholarship, I've been able to stay focused academically while stepping up as a peer mentor. This program has shown me that leadership isn't about a title—it's about helping others and passing on what you've learned.”

Matt Landon
Student Influencer

Annual contributions are crucial to the continued success and growth of our initiatives. We're deeply grateful to the more than 1,050 donors whose generosity and belief in our mission make it possible to support and empower the next generation of CPAs, and we're proud to honor them here.

President's Pavers (April 1, 2024 - March 31, 2025)

\$100,000

Dempsey J. Travis Foundation

\$15,000 - \$20,000

Illinois CPA Society
Joan Moore

\$10,000 - \$14,999

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Paving the Way for Tomorrow's CPAs

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