

## Information and Instructions – Sections 1 through 8 must be completed

**Bursary requirements may change from term to term. Please read instructions carefully before completing your application.**

The Student Awards & Financial Aid Office (SAFA) administers numerous undergraduate and graduate bursary funds. Bursaries are based primarily on financial need but may include other selection criteria such as extracurricular involvement, leadership, etc.

If you have not been assessed by the automatic uWaterloo bursary process and find yourself in, or anticipate that you will have, financial difficulty during your study term, you may apply for a University of Waterloo Full-Time Bursary. You must be enrolled in full-time studies, (at least a 60% course load, or 40% if you have a permanent disability.) Bursaries do not replace expected government aid; you are expected to apply to the Ontario Student Assistance Program (OSAP), (or another province's government student assistance program) to help you meet your education-related costs. Bursary decisions are made in conjunction with the assessed need under your government student assistance plan. If you have not already applied, OSAP applications are available on the Ministry's website <http://osap.gov.on.ca>.

### Other Provincial Student Assistance Programs

If your financial assistance is from another province, please ensure that you provide us with a copy of your Provincial Student Loan Assessment, outlining the costs and resources used in the assessment of need.

### Students Not in Receipt of Government Financial Assistance

If you have not applied for government financial assistance, your bursary application will not be considered unless you have exceptional circumstances. Please provide a detailed explanation and supporting documentation.

### Deadlines

Bursaries are normally considered after the term starts once your enrolment has been confirmed.

Please ensure that your fees have been paid or you have made a fee arrangement with the Student Accounts office before you apply for a bursary.

Term(s) you will be attending school	Application Deadline	Notes
Fall only	October 30	Non-Co-op Program Applicants: You must clearly indicate on the application form that you will not be attending school in the Winter term.
Fall and Winter	February 28	Bursaries are applied to your Winter term tuition account and any credit balance will be refunded to you.
Winter only	February 28	
Spring only	June 22	

**Note: Where the advertised deadline falls on a Saturday or Sunday, the deadline is the preceding Friday.**

### Academic Requirements

Generally, bursary candidates must have a satisfactory overall academic standing. Some bursaries/awards may require a higher academic standing.

### Co-op Work Term

As with OSAP, you are not eligible to receive bursary assistance if you are on a co-op work term. You must be enrolled in full-time studies (at least 60% course load or 40% if you have a permanent disability) during the term in which you wish to receive bursary funding.

### OSAP or Out of Province Assistance Appeals

Before being considered for a bursary, students are required to seek financial support from all sources, including family, employment, government support programs and loans. Please check the Student Awards & Financial Aid website at [safa.uwaterloo.ca](http://safa.uwaterloo.ca) for information on OSAP appeals or check your province's student financial aid website for possible appeals.

### Timing of Decisions

Your application will be adjudicated only after we are able to verify your OSAP entitlement or your other provincial assistance. Bursary adjudication can take up to one month following the application deadline.

All bursary decisions are final. Appeals will be considered only if there is new or exceptional information with applicable supporting documentation. If you have exceptional circumstances, please call Linda Jajko in the Student Awards and Financial Aid Office, telephone # 519-888-4567, ext. 35726 to discuss your situation and/or to arrange a personal interview with a Financial Aid Counsellor.

### SPECIAL NOTES:

- Incomplete applications will not be considered. Applications must be signed in ink – faxes are not accepted. The checklist on the last page provides you with a list of information and documentation that must accompany this application.
- All bursaries are applied to your student account once you have made a fee arrangement with the Student Accounts office, or paid your fees. Any credit balance will be refunded to you.
- Bursary adjudication does not take place until after the advertised deadline. Therefore any assistance from these funds can not normally be used to make fee arrangements. Please call the SAFA office at 519-888-4567 ext. 33583, if you wish to make an appointment with a Financial Aid Counsellor.
- Bursary recipients will be notified by letter or email, or will see the bursary listed as Anticipated Aid on their Quest account.
- If you are claiming medical/dental expenses, you must provide receipts as well as a letter signed by you confirming that the costs were not or will not, be paid by another person or claimed against OHIP, an employee benefit plan or a private insurance plan.
- Any changes to your enrolment and/or course load may result in your bursary being adjusted or withdrawn.

**Term(s) for which you are requesting assistance – Note: your request for bursary assistance should match the term(s) on your OSAP or other Provincial Financial Aid Assessment.**

Fall only     Winter only     Fall and Winter     Spring only

I am applying for a Full-Time Bursary     I am applying for this specific Bursary / Award: \_\_\_\_\_

*Ontario First Generation Bursary Applicants:* Have your parents attended any post-secondary studies, in any program, full or part-time, in or outside of Canada, at any time?     Yes     No

**1. Personal Information (please use pen and write clearly)**

uWaterloo ID No. \_\_\_\_\_

Last Name \_\_\_\_\_ First Name \_\_\_\_\_

Home Address \_\_\_\_\_ Telephone (    ) \_\_\_\_\_

City \_\_\_\_\_ Region/Country (i.e. Durham): \_\_\_\_\_

Province \_\_\_\_\_ Postal Code \_\_\_\_\_ Email Address \_\_\_\_\_

Citizenship:     Canadian     Permanent Resident

Are you an Aboriginal Person? (voluntary declaration)     Yes     No/Undeclared  
*(An Aboriginal person is an individual who is First Nation, Métis or Inuit)*

Do you have any dependent children?    Number \_\_\_\_\_ Ages \_\_\_\_\_

Have you lived in Ontario for at least 12 months in a row, up to the beginning of your post-secondary studies?     Yes     No

Have you applied for OSAP or other provincial student aid?     Yes     No    If no, you must provide an explanation and supporting documentation.

Specify Province: \_\_\_\_\_

Have you made your fee arrangement or paid your fees?     Yes     No    Note: Fees must be arranged before any bursary funds can be released.

**2. Academic Information**

Campus:     University of Waterloo     Renison College     St. Jerome's University     Distance Education Studies

Undergraduate Student     Graduate Student     Co-op     Regular

Academic Level or Term in Program \_\_\_\_\_ No. of courses this term: \_\_\_\_\_ Overall academic average \_\_\_\_\_

Faculty \_\_\_\_\_ Dept/Major \_\_\_\_\_

**3. Extra-Curricular Activities**

Some bursaries/awards also recognize other accomplishments.

Are you currently involved or do you actively participate in extra-curricular activities?     Yes     No

Indicate all that apply:     Sports     Community Volunteer     Campus Volunteer     Campus Clubs     Federation of Students

Please describe your involvement in and/or contribution to extra-curricular activities, including any organizations, clubs, volunteer activities, sports, or leadership experience. Attach a separate sheet if needed.

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

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\_\_\_\_\_

## 4. General Information and Instructions

Please circle the letter beside the following statements that apply to you as of the first day of the term you are applying for bursary assistance.

- a) You are married - Effective date \_\_\_\_\_  
b) You are in a 2-year common-law relationship, or you and your partner live together with your natural children - effective date \_\_\_\_\_  
c) You have been out of high school for 4 years or more  
d) You have not been a full-time student at a high school or post-secondary Institution for at least 12 consecutive months on 2 or more occasions
- e) You are divorced/separated/widowed – Effective date \_\_\_\_\_  
f) You are a sole-support parent  
g) Both of your parents are deceased, or you are a ward of the crown  
h) None of the above statements is applicable

If you circled: **a or b** Complete the Spousal and Your Financial Information sections  
**c, d, e, f, g** Go directly to the Your Financial Information section  
**h** Complete the Parental and Your Financial Information sections

### Parental Information – if you circled ‘h’ above

Parent’s Marital Status:  Married  Single  Divorced  Widowed  Separated  Common-Law

No. of dependents including applicant: \_\_\_\_\_ No. of dependents in post-secondary education: \_\_\_\_\_

#### Father’s Actual Income:

Line 150 on 2011 tax return \_\_\_\_\_

Line 236 on 2011 tax return \_\_\_\_\_

Father’s other income (not reported on income tax) \_\_\_\_\_  
(eg. non-taxable income, foreign income, lottery winnings, insurance payouts)

#### Mother’s Actual Income:

Line 150 on 2011 tax return \_\_\_\_\_

Line 236 on 2011 tax return \_\_\_\_\_

Mother’s other income (not reported on income tax) \_\_\_\_\_  
(eg. non-taxable income, foreign income, lottery winnings, insurance payouts)

**In some situations, the family income will be significantly reduced in 2012. If your parent(s)’ 2012 income will be substantially less than the previous year’s income, this may be grounds for an OSAP Appeal. Please check [safa.uwaterloo.ca](http://safa.uwaterloo.ca) for more information.**

### Spousal Information – if you circled ‘a’ or ‘b’ above

Name of spouse / partner \_\_\_\_\_

Occupation of spouse / partner:  Full-time student  Employed  Other – specify \_\_\_\_\_

Will your spouse / partner be living in Canada during your study period?  Yes  No

Will your spouse / partner be a full-time student for a minimum of 12 weeks?  Yes  No

When was the last time your spouse / partner attended high school? (month / day / year) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Spouse/Partner’s Income on Line 150 of 2011 Income Tax Return \_\_\_\_\_ Other income (not reported on income tax) \_\_\_\_\_  
(eg. non-taxable income, foreign income, lottery winnings, insurance payouts)

**In some situations, the family income will be significantly reduced in 2012. If your spouse/partner’s 2012 income will be substantially less than the previous year’s income, this may be grounds for an OSAP Appeal. Please check [safa.uwaterloo.ca](http://safa.uwaterloo.ca) for more information.**

### Income Source and Declarations – if you completed either the Parental or Spousal Information sections above

If main sources of parent(s)’ or spouse / partner’s income is from provincial social assistance, please specify:

- Ontario Disability Support Program (Family Benefits for Disabled – Gains D) \_\_\_\_\_  
 Family Benefits \_\_\_\_\_
- General Welfare / Ontario Works \_\_\_\_\_  
 Other – specify \_\_\_\_\_

### Income Verification

If you did not apply for OSAP or if you applied for student assistance from another province, please provide a copy of your parent(s)’ or spouse/partner’s 2011 Canada Customs and Revenue Agency Notice of Assessment in order to verify your family income, and ensure your parent(s) or spouse/partner sign below. If your parent(s)’ or spouse/partner’s source of income is foreign, please provide a recent confirmation of income (pay stubs, letter from employer, etc).

## 5. Declaration and Consent for Parents and Spouses/Partners – Not required if you have applied for OSAP

I authorize the University of Waterloo to release a copy of this application to the appropriate awards selection committee(s) and to the award donor, including copies of any income information attached to this application.

I understand that the collection of personal information provided on this application or accompanying documentation is used solely for the purpose of determining eligibility for bursary assistance and verifying income information against OSAP files.

I declare that all of the information that I have given on this form is complete, true and accurate. If any information is inaccurate, I understand that any bursary awards may be reassessed and/or withdrawn.

Father’s Signature \_\_\_\_\_ Date \_\_\_\_\_  
(Not required if you have applied for OSAP)

Mother’s Signature \_\_\_\_\_ Date \_\_\_\_\_  
(Not required if you have applied for OSAP)

Spouse/Partner’s Signature \_\_\_\_\_ Date \_\_\_\_\_  
(Not required if you have applied for OSAP)

## 6. Your Financial Information

**Pre-Study Budget** (Please refer to your OSAP or other Provincial Financial Aid application, as the budgets and the pre-study periods applied for should be the same). Pre-Study period is the 16 weeks before the start of your full-time study period (9 weeks if you graduated from high school in June 2012). Each bursary applicant is expected to make a contribution from summer or work term earnings. The minimum amount is \$2,826 for 16 weeks, or \$1,589 for 9 weeks.

This budget applies to the period from (DD, MM,YY) \_\_\_\_\_ to (DD,MM,YY) \_\_\_\_\_

**I was in school full-time (60% course load or greater) during my pre-study period and therefore have not completed the pre-study period income and expenses.**

Accommodations during your pre-study period:  With your parents  Other - provide location \_\_\_\_\_

**Income**

Gross income received during your pre-study period \_\_\_\_\_

- CPP deductions \_\_\_\_\_

- EI deductions \_\_\_\_\_

- Income tax deductions \_\_\_\_\_

Net income received during your pre-study period \_\_\_\_\_

plus+  
- Other income received during pre-study period (explain) \_\_\_\_\_

**Total Income** \$ \_\_\_\_\_

**Expenses (NOTE: Do not include computers, car insurance or repairs)**

Rent and Utilities \_\_\_\_\_

Phone / Internet \_\_\_\_\_

Food \_\_\_\_\_

Personal Care \_\_\_\_\_

Clothing \_\_\_\_\_

Local Transportation \_\_\_\_\_

Laundry and dry cleaning \_\_\_\_\_

Entertainment / recreation \_\_\_\_\_

Uninsured medical / dental (receipts required) \_\_\_\_\_

Other expenses (receipts required) \_\_\_\_\_

Childcare \_\_\_\_\_

**Total Expenses** \$ \_\_\_\_\_

**Savings from pre-study period (Income less Expenses)** \$ \_\_\_\_\_

If the main source of your income is from provincial social assistance, please specify:

Ontario Disability Support Program \_\_\_\_\_  General Welfare / Ontario Works \_\_\_\_\_

Family Benefits \_\_\_\_\_  Other – specify \_\_\_\_\_

**Study Period Budget** (Please refer to your OSAP or other Provincial Student Loan Assessment, as the study period dates and resources on this bursary application should be the same. Note that any discrepancies may require clarification and/or changes to your student loan application.)

This budget applies to the period from (DD,MM,YY) \_\_\_\_\_ to (DD,MM,YY) \_\_\_\_\_

Accommodations during your study period:  With your parents  In residence \_\_\_\_\_ (specify)  Other \_\_\_\_\_ (specify)

**Income and Resources**

Savings from pre-study period (above) \_\_\_\_\_

Gross part-time income (before tax) \_\_\_\_\_

Any other income during study period  
(Specify), include RA + TA income, Include amount of RESP being used for this study period \_\_\_\_\_

Parental/spousal contributions  
(if zero, explain on a separate page) \_\_\_\_\_

Awards, scholarships and bursaries  
(specify) \_\_\_\_\_

Government benefits (specify type) \_\_\_\_\_

Any other assets (specify type and amount)  
eg. GIC, RRSP, \_\_\_\_\_

OSAP/Provincial Gov't Assistance amount for study period \_\_\_\_\_

**Total Income** \$ \_\_\_\_\_

Amount available from existing Student Line Of Credit (attach proof) \_\_\_\_\_

**Expenses (NOTE: Do not include computers, car insurance or repairs)**

Tuition and Compulsory Fees \_\_\_\_\_

Books and Supplies \_\_\_\_\_

Rent and Utilities / Residence Fees \_\_\_\_\_

Phone / Internet \_\_\_\_\_

Food / Meal Plan \_\_\_\_\_

Personal Care \_\_\_\_\_

Clothing \_\_\_\_\_

Local Transportation \_\_\_\_\_

Laundry and dry cleaning \_\_\_\_\_

Entertainment / recreation \_\_\_\_\_

Uninsured medical / dental (receipts required) \_\_\_\_\_

Other expenses (receipts required) \_\_\_\_\_

Childcare \_\_\_\_\_

**Total Expenses** \$ \_\_\_\_\_

**Bursary amount requested (Expenses less Income)** \$ \_\_\_\_\_

\* If this amount is negative, you do not have a need.

Please note: Bursary awards are based on reasonable costs.

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## 7. Checklist – Check all that apply to you

**Note: Incomplete bursary applications will not be considered. Ensure you have included ALL supporting documentation required.**

**Depending on your circumstances:**

- Have you applied for government financial aid?
- If not, do you have exceptional or extenuating circumstances which you have fully documented and explained?
- Have you provided a copy of your Notice of Assessment from your provincial student aid authority if other than Ontario?
- Have you explored all possible OSAP appeals (i.e. Pre-Study Contribution Review, Parent(s)/Spouse's Lower Estimated Income Review, etc.)?
- Have you or your parents, spouse/partner completed the Information sections and have you provided the necessary income verification for yourself, your parents, or your spouse?
- Have you completed the "Your Financial Information" section, and provided detailed budgets for both Pre-Study Period and Study Period?
- Have you provided a detailed letter explaining your financial situation and any other documentation to assist in the determination of your bursary entitlement?
- If applicable, have you completed the Extra-Curricular Activities section? Have you provided a detailed description of this involvement?
- Are all required signatures completed?

## 8. Applicant's Declaration and Consent

I authorize the University of Waterloo to release a copy of this application to the appropriate awards selection committee(s) and to the award donor, including my academic record and copies of any information attached to this application.

In order to adjudicate my application for a university/college bursary/award, I authorize the University of Waterloo to release my financial need information and uWaterloo bursary decision to the appropriate University/College Award Selection Committee(s).

I understand that I am responsible for providing all required documentation as indicated on this application or as directed by the University of Waterloo, Student Awards & Financial Aid Office. I understand that if I do not submit the required documentation/information I may not be considered for a bursary.

I understand that all income, assets and other resources will be verified using my OSAP application information, if applicable.

I understand that the collection of personal information provided on this application or accompanying documentation is used solely for the purpose of determining my eligibility for bursary assistance and verifying income information against my OSAP file.

The Ministry of Training, Colleges and Universities (the Ministry) has provided the University of Waterloo (uWaterloo) with funding to administer several bursaries i.e. Aboriginal PSET Bursary, Ontario First Generation Bursary etc. As a condition of this funding, uWaterloo is required to make reports to the Ministry of your contact information, the amount of bursary you receive and the date it was awarded, your study period and information related to your eligibility for the bursary. This personal information will be used by the Ministry to administer and finance the bursary. It will also be used to establish the minimum amount of student aid uWaterloo is required to provide under the Student Access Guarantee (the Guarantee) and to administer and finance the Guarantee. If you apply for OSAP, this personal information will be used to update your OSAP application or award, including your declared income. Administration includes: public reporting on the administration and financing of the bursary and the Guarantee; monitoring and auditing uWaterloo or its authorized agents to ensure that we are administering the bursary appropriately; conducting risk management, error management, audit and quality assessment activities; and conducting policy analysis, evaluation and research related to all aspects of student assistance. Financing includes: planning, arranging or providing funding of the bursary and the Guarantee. The Ministry administers the bursary and the Guarantee under the authority of the Ministry of Training, Colleges and Universities Act, R.S.O. 1990, c. M.19 as amended.

I declare that all of the information that I have given on this form is true and accurate. If any information is inaccurate, I understand that any bursary awarded may be reassessed and/or withdrawn.

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

Please submit completed applications to: Student Awards & Financial Aid  
2<sup>nd</sup> Floor, Needles Hall  
University of Waterloo  
200 University Avenue, West  
Waterloo, Ontario  
N2L 3G1