



California Society of Enrolled Agents  
Education Foundation

California Society of Enrolled Agents  
3200 Ramos Circle  
Sacramento, CA 95827-2513

Tel: 916-366-6646  
Fax: 916-366-6674  
www.csea.org

## SCHOLARSHIP APPLICATION FORM For California Residents

The primary purpose of the CSEA Education Foundation Scholarship Program is to foster, improve and provide access to tax-related information and services available to the general public through education programs and scholarships aimed at increasing the knowledge of current Enrolled Agents and potential Enrolled Agent candidates. This application is for EAs who wish to broaden their knowledge in the field of taxation. **Please note that CSEA Education Foundation scholarships are NOT awarded for courses necessary to maintain Continuing Professional Education Requirements.** All decisions of the CSEA Education Foundation are final.

### **Applicant Instructions & Checklist** (If all required information is not included with your application it will be rejected)

- Please include three personal letters of recommendation with your application. These could be written by your supervisor, a colleague, an instructor or someone you volunteer with, in your community.
- If you are applying for reimbursement for a prior class, one of the letters must be from one of the event's instructors and you must include a copy of your CPE Certificate and a copy of the paid receipt. **Reimbursement Scholarships are only awarded within 12 months of the final date of the class.**
- Include a copy of the Education Provider's event brochure or a detailed description along with a copy of your paid receipt from the provider if you have already registered. If you have not already registered and receive a scholarship the check will be made payable to the education provider. **You must provide a copy of the paid receipt for direct reimbursement.**
- Submit a completed application to the CSEA Education Foundation Scholarship Committee, 3200 Ramos Circle, Sacramento, CA 95827-2513. Scholarships are awarded up to three times annually, your application will be considered in a timely basis and you will be notified of receipt of your application within two months after the application deadline. **The deadlines for receipt of scholarship applications are currently June 30, September 30, and December 30 of each calendar year.** Notification will be emailed to the address shown on the application.
- Your scores are judged solely on your responses to the questions in the Applicant's Statement. Please make sure to answer all the questions and be careful to either type out the questions with the responses below or clearly mark which question you are responding to. **It is important to use proper grammar, punctuation, correct spelling, follow directions and to keep your answers brief and to the point. The scoring threshold for an applicant to receive a scholarship is 75%. The maximum amount of any scholarship award will be \$800 per applicant per year.**
- Please note that this is an anonymous selection process; any inclusion of identifying personal or geographic information beyond the contact information section may disqualify your application. If you are not awarded a scholarship, you will have a second opportunity to apply and mentoring is available.



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**Application Type:**

**Non- EAs who are considering an Enrolled Agent Career**  
(Not Currently or Previously Licensed as an Enrolled Agent)

**California Enrolled Agent**  
EA License # \_\_\_\_\_ Year Enrollment Card Received \_\_\_\_\_

**Applicant: (Please type or print clearly)**

Name (First and Last) \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email Address \_\_\_\_\_

Are you a California resident? Yes \_\_\_ No \_\_\_

**Educational Event Information:**

(Courses to further knowledge in field of taxation, finance and accounting, not for fulfillment of CPE requirements.)

Name of Event \_\_\_\_\_ Dates \_\_\_\_\_

Course Title & Description \_\_\_\_\_

Provider Name \_\_\_\_\_ Street Address \_\_\_\_\_

Amount of Tuition \$ \_\_\_\_\_ Amount of Books/Materials \$ \_\_\_\_\_ Total Requested Amount \$ \_\_\_\_\_

How did you hear about the CSEA Education Foundation and its scholarship program?  
\_\_\_\_\_

Have you applied for, or been awarded, a scholarship from any other source for the education covered in this application? Yes \_\_\_ No \_\_\_

If yes, from what source? \_\_\_\_\_ Amount Awarded \$ \_\_\_\_\_

**I CERTIFY THAT ALL STATEMENTS CONTAINED IN THIS APPLICATION ARE TRUE TO THE BEST OF MY KNOWLEDGE AND BELIEF. I UNDERSTAND THAT FALSIFICATION OF THE INFORMATION CONTAINED HEREIN WILL VOID THIS APPLICATION AND DISQUALIFY ME FROM RECEIVING CSEA EDUCATION FOUNDATION SCHOLARSHIPS.**

**SHOULD YOU BE AWARDED A SCHOLARSHIP THROUGH CALIFORNIA SOCIETY OF ENROLLED AGENTS, I UNDERSTAND MY NAME WILL APPEAR IN A HARDCOPY AND IN ANY ELECTRONICALLY CSEA PUBLICATIONS.**

SIGNATURE \_\_\_\_\_ Dates \_\_\_\_\_



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**Applicant's Statement**

**Please make sure to follow directions and check your work carefully for typos. Pay close attention to grammar, spelling and punctuation.**

Please attach a separate statement, **no more than three to four pages in total length**. Please follow this format/question order when responding.

1. What is your educational background and what are your specific educational goals? (100 words or less)
2. What is your current professional position and what are your career and professional goals? (100 words or less)
3. Please describe your major volunteer, or community accomplishments over the past ten years. (100 words or less)
4. **A. Please answer if you are Not an Enrolled Agent:** Provide a description of what an Enrolled Agent is and what you believe is an Enrolled Agent's role, duties and responsibilities? Please answer in your own words. (200 words or less)  
**B. Please answer if you are a California Enrolled Agent:** Please answer the following question in your own words. "What is an Enrolled Agent and how does this help the taxpayer?" (200 words or less)
5. How would the award of a scholarship help you further your career as an EA, other than financial need? (100 words or less)
6. Explain the relationship of CSEA and NAEA to an Enrolled Agent. (100 words or less)
7. What additional information do you believe may be helpful to us in evaluating your application? (100 words or less)