

**WASHINGTON STATE TAX CONSULTANTS
ROY SCRUGGS SCHOLARSHIP FUND**

(Revised January 1, 2012)

Dear WSTC Members and Applicants:

Thank you for your interest in the Roy Scruggs Scholarship Fund, managed by the Washington State Tax Consultants Board of Directors. The Scholarship Committee is delighted to have this opportunity to award scholarships to current members, both long term seasoned tax preparers or those newer to our organization that wish to join in the pursuit of excellence in tax preparation.

We only ask that you express your need thru the application process and a committee will select from the applications in a manner that furthers the WSTC mission: **To promote excellence and professionalism in the tax preparation industry through education, networking, and adherence to the highest ethical standards.** If you know someone who can benefit from a scholarship you may "mentor" or assist them in the application. They must however sign the application themselves.

The fund balance on September 30th of each year determines the amount of scholarship's available for each year. This amount can be found on the September 30th Balance Sheet from the state treasure. The funds will be distributed in the following manner.

10% of funds for WSTC sponsored Seminars Dated Aug 1 to November 30th.

First application deadline will be May 1st.

10% of the funds for WSTC sponsored Seminars Dated December 1 to July 31st.

First application deadline will be September 1st.

30% of funds for WSTC State Convention which is usually in May or June.

First date for application will be September 1st.

The applicant must be a current member of WSTC. The committee chair will verify membership prior to sending the application to the selection committee. The selection committee will not have names or locations of the members. They will only have the page 2 of the application and the accompanying essay described in the application. The intent is for the scholarship to be a non-biased need based scholarship. Applicants may receive no more than 2 scholarships per year.

The application deadline is the first date an application will be considered. All applications received (not postmarked) prior to the application deadline will be considered for that period's money at the same time. If money is still available it will continue to be disbursed first come, first considered basis until the period ends or the money is depleted.

Any money left over will be deferred into the next year's funds available.

If it is late in the period and you are concerned that there may not be funds available you may contact the Scholarship Chairman to inquire. We cannot guarantee a timely answer. We suggest you send the application anyway.

Qualified Education is any seminar or convention that is sponsored by WSTC. This can be state or chapter sponsored education. Generally the committee will not authorize more than 50% of the tuition needed for the seminar or convention. This means the applicant needs to

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be prepared to pay the other 50%. A Brochure describing the education will need to be attached to the application. Any money awarded will be sent directly to the sponsoring organization on behalf of the applicant. We must disclose to this organization that this is scholarship money and any balance due will be paid the attendee.

Applicants will be notified as soon as possible after the committee receives the application. Please allow us at least 2 weeks to process an application. If you are awarded a scholarship and you must verbally accept the scholarship. You will be contacted by phone or email as soon as you are approved and you must respond saying you are accepting the scholarship.

If you have further questions please contact the scholarship committee chairman Susan Lauderdale at nwatax@yahoo.com (please put WSTC Scholarship in the subject line) or at 360-694-8206

The address to mail an application is Northwest Accounting & Tax Service, 1307 NE 78th Street B12, Vancouver WA 98686

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Scholarship Application

Please answer all questions and type your response whenever possible. Applicants must be a current member of WSTC and the Education or Convention must be sponsored by the WSTC.

You must attach a Brochure for the education you wish to attend to this application with the application filled out so we can forward the funds to the appropriate organization.

Office Use Only: Applicant No

Date: _____

First Name	Initial	Last Name
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WSTC Chapter

Address - Street, P.O. Box, Suite

City, State, Zip Code

Business phone	Other Phone	Fax Number
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E-mail address

You will be contacted as soon as the committee is able to make a decision. We want to remind you that you must respond saying that you are still planning on attending the seminar before any funds will be mailed.

WSTC has my permission to publish information regarding scholarship money that was disbursed by event and by chapter without disclosing an individual's name.

Signature

Date

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Office Use Only: Applicant No _____

Education Applied For:

- ___ Seminar or Class August to November (application period begins May 1)
- ___ Seminar or Class December to July (application period begins September 1)
- ___ WSTC Convention (application begins September 1)

Seminar Date: _____

Class or Seminar Name: _____

Total Cost of Seminar: \$ _____

The committee will usually provide no more than 50% of the tuition cost.

Applicant General Information

Instructions:

Please supply the information requested below, then, proceed to the essay. While you may wish to reiterate some of the general information in your essay, you **must refrain** from any mention of your geographic location or other identifying facts—it is essential that the applicants remain anonymous in order to ensure the fairness of the selection process. **Any reference that could identify you will be blacked out prior to it being sent to the selection committee and my make your application look less professional.**

1. List your background as a tax preparer. When did you get your PTIN? What are your plans to meet the qualifications of a Registered Tax Preparer or EA .(If more space is needed, use additional pages.)

2. When did you get your PTIN? _____
3. What are your plans to meet the requirements to be a Registered Tax Preparer?

4. How long have you been a tax practitioner? _____ year(s) _____ month(s)
5. Are you self-employed? Yes No

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6. Prepare a maximum one page essay, which includes information not covered under "General Applicant Information." Please briefly explain your need for a scholarship. You may also discuss your goals and ambitions in the area of income tax preparation. You may wish to explain your reasons for choosing to go the Class, Seminar or Convention. Include any other relevant information you'd like to share with the Committee. **Your essay should be computer typed and double-spaced.** Please attach the essay to your application
7. All applications received by the committee chairman will be forwarded to the selection committee once it is verified that the application is a WSTC member and it is within the periods described in the scholarship letter

8. Mail, fax or email applications to:

WSTC Scholarship Committee
C/O Northwest Accounting & Tax Service
1307 NE 78th Street, B12
Vancouver, WA 98665

Fax: 360-694-0026

Should you have questions about the receipt of the application please Susan Lauderdale, Scholarship Committee Chairman at 360-694-8206 or nwatax@yahoo.com (please put WSTC Scholarship in the subject line).

9. You will be contacted by email or phone as soon as a decision has been made. **You must respond to the contact confirming your intention to still attend the class, seminar or convention and your intention to pay the remainder balance.** We will make 3 attempts to contact you within a two-week period. If we do not receive a response the committee reserves the right to disperse the funds to another applicant