



The American Institute of Certified Public Accountants

## 2007 – 2008 FELLOWSHIPS FOR MINORITY DOCTORAL STUDENTS

*Competitive awards of up to \$8,000 per year of study for accounting scholars who, in the opinion of the AICPA's Selection Committee, show significant potential to earn a Ph.D. in accounting .*

### READ THIS IMPORTANT INFORMATION

Thank you for expressing an interest in the AICPA Minority Doctoral Fellowships. The primary objective of this program is to make it possible for more minorities to enter or move ahead in the accounting profession. These fellowships are awarded by the Institute's Minority Initiatives Committee and funded by the AICPA Foundation from monies contributed by the AICPA, public accounting firms, individual CPAs and others.

AICPA Doctoral Fellowships are awarded once each year (in May) for the following academic year. **All application materials must be received by the AICPA by April 1, 2007.** The applicant is solely responsible for assuring that all application materials are received on time. *The AICPA cannot be responsible for materials delayed or lost in the mail.*

AICPA Doctoral Fellowships are available only to full-time minority students in doctoral programs with a concentration in accounting. For purposes of this program, the AICPA defines minority students as those of Black, Native American, Pacific Island races, or of Hispanic ethnic origin. All applicants must be U.S. citizens.

The committee may grant fellowships contingent upon acceptance of the candidate into a doctoral program at an accredited school of business or to candidates who have already been accepted. Fellowships are awarded annually and disbursed in ten equal monthly payments beginning in September.

#### **Eligibility**

To be eligible for a Doctoral Fellowship, you must:

- Be a minority student who has applied to and/or has been accepted into a doctoral program with a concentration in accounting;
- Have earned a Master's degree and/or completed a minimum of three years full-time experience in the practice of accounting;
- Currently attending or planning to attend school on a full-time basis and, once admitted, work consistently and forthrightly to attain your degree;
- Agree not to work full time in a paid position or accept responsibility for teaching more than one course per semester as a teaching assistant or, dedicate more than one quarter of the time as a research assistant.

Considerable weight will be given to applications from those who have attained the CPA designation. Additionally, AICPA membership and committee service will also be considered.

#### **Non-CPAs**

- You must provide a statement on your plans to become a CPA including a time line.
- You must provide a statement on whether you meet requirements to sit for the exam in your respective state (after reviewing the current requirements) and if not what are you lacking.

#### **Official Academic Transcript Required**

An **Official Academic Transcript** from each institution from which you have received a degree is required. You must request that the registrar(s) of your school(s) send this (these) directly to us. ***We will not accept student copies or other unofficial transcripts, or transcripts that arrive after April 1, 2007.*** Most schools assess a nominal service charge to send official transcripts.

#### **Personal/Professional References Required**

You must obtain confidential references from two individuals. References should be people who can speak knowledgeably to your qualifications for doctoral study in accounting.

#### **Renewals**

Awards are made for a single academic year. Fellowship renewals will be based upon your continuing to make satisfactory progress, as well as your overall financial need, as a full-time student, toward completion of your degree requirements. Recipients are eligible to receive funding from the AICPA for a total of five years, including renewals.

#### **For Further Information**

Please read these instructions and those on the following pages carefully before you call for additional information. If you cannot find the answer to your questions on the form, please send an e-mail with your contact information to [MIC\\_Programs@aicpa.org](mailto:MIC_Programs@aicpa.org).

Additional copies of this application can be downloaded at: <http://www.aicpa.org/diversity>

# MINORITY DOCTORAL FELLOWSHIPS

## 2007–2008 Application

We will not be able to process your application unless you carefully follow these instructions.

1. File requests for official transcripts with each and every institution of higher education for which you have received a degree. ***These transcripts must be sent directly to the AICPA at the address below by the school(s) involved, and they must arrive by April 1, 2007.*** (Unofficial or student copies of transcripts are unacceptable.)
2. Complete Part 1 of each of the enclosed reference forms, then give one form to each of the two individuals you have selected to provide references. ***Your references must complete Part 2 of the form, place it in an envelope, seal the envelope, sign across the flap, and return the envelope to you.*** You must enclose the sealed reference envelopes with your completed application form.
3. Complete Sections A and B of this form, which comprise three pages. It is through this information that the selection committee will “get to know” you, so think carefully about your responses and write clear, well-organized answers. ***All responses (except signatures) must be typed or neatly printed.***
4. Complete a ***financial estimated budget for the 2007-2008 academic year*** of the enclosed financial information sheet.
5. Please do not staple anything to the application. Your application should be inserted into a standard business envelope and mailed to the AICPA at the address below. It is your responsibility to ensure that the registrar(s) from whom you have requested transcripts has enough time (usually three to four weeks) to get the transcripts to us by April 1. We can only accept original documents, so you may not fax materials to us. ***Plan carefully so that your application receives the consideration it deserves.***
6. We reserve the right to verify all information on the document, false information can terminate the fellowship.

**All materials should be sent to (Note: this is a new address)**

American Institute of Certified Public Accountants  
Minority Doctoral Fellowships Program  
Academic and Career Development Team – MIC  
Durham Office  
220 Leigh Farm Road  
Durham, North Carolina 27707-8110

**The deadline for receipt of all materials is APRIL 1, 2007.**

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**Section A. Please TYPE or print all responses.**

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Permanent Address: \_\_\_\_\_

Area Code and Telephone Number (home/work): \_\_\_\_\_

E-mail Address \_\_\_\_\_

Are you a U.S. citizen?

Yes  No

Are you a CPA?  Yes  No

License Number \_\_\_\_\_

State of Licensure \_\_\_\_\_

Are you a member of the AICPA?  Yes  No

Member Number \_\_\_\_\_

**Minority Group:**

Pacific Islander  Native American  Hispanic  Black

I certify that I am a minority student eligible for this AICPA fellowship, and that I am in need of this assistance to continue my education. I agree to work consistently and forthrightly toward completion of my doctoral degree, and I will not accept responsibilities (such as working full time in a paid position or accept responsibility for teaching more than one course per semester as a teaching assistant or, dedicate more than one quarter of the time as a research assistant) that would conflict with this objective. Finally, I certify that all information provided on this application and all supporting documents is correct, complete and accurate. I agree to notify the AICPA of any changes in my status.

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Signature

Date

# AICPA MINORITY DOCTORAL FELLOWSHIPS

## 2007–2008 Application

### Section B. Please TYPE or print all responses.

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Gender:  Male  Female      Marital Status:  Single  Married      No. of dependents excluding yourself \_\_\_\_\_

Anticipated Degree Program:  Ph.D.  D.B.A.  Other: \_\_\_\_\_

Anticipated Date of Completion: \_\_\_\_\_ Month \_\_\_\_\_ Year \_\_\_\_\_

Major field of study: \_\_\_\_\_

Have you already started a doctoral program?  Yes  No

#### If Yes:

When did you begin your program? \_\_\_\_\_

Have you finished your course work?  Yes  No      If yes, when \_\_\_\_\_

Have you completed your comprehensive exams?  Yes  No      If yes, when \_\_\_\_\_

Has your dissertation proposal been accepted?  Yes  No

When do you anticipate completing your:

a) Comprehensive Exams \_\_\_\_\_

b) Dissertation \_\_\_\_\_

#### If No:

To which doctoral program(s) have you applied? \_\_\_\_\_

To which doctoral program(s) have you been accepted? (Enclose copy of acceptance letter(s)) \_\_\_\_\_

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

All applicants please complete:

Have you attended one of the PhD Project Annual November Conferences?  Yes  No      If yes, what year? \_\_\_\_\_

#### Please list your scores on the following tests, and enclose a copy of your official test score reports:

<b>GMAT Exam</b>	<b><u>Score</u></b>	<b><u>Percentile</u></b>	<b>GRE Exam</b>	<b><u>Score</u></b>	<b><u>Percentile</u></b>
Verbal	_____	_____	Verbal	_____	_____
Quantitative	_____	_____	Quantitative	_____	_____
Total	_____	_____	Total	_____	_____
Date Taken	_____	_____	Date Taken	_____	_____

# AICPA MINORITY DOCTORAL FELLOWSHIPS

## 2007–2008 Application

Name: \_\_\_\_\_

*Please TYPE or print all responses.*

Dates		Name, City and State of School Attended	Major Field	Degree Awarded	GPA	
From	To				Overall	Acctg.

List all the **schools you have attended** at the undergraduate and if applicable, graduate level. For each school, indicate the dates of attendance, degree(s) received, major field of study, and overall and accounting GPA.

Dates		Name, City and State of Employer	Position Held
From	To		

List your **work experience**, including part-time and/or summer positions, present employer first. (You may attach a copy of your résumé, but this section **must** be completed.)

What other sources and amounts of financial support do you expect to receive during your studies? \_\_\_\_\_

Additional comments about your financial need: \_\_\_\_\_

List any **honors, scholarships, or awards** you have received (indicate date, nature of award, and granting organization):

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List any **extracurricular activities or organizations** in which you are or have been an active participant:

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On a separate sheet of paper, please write a brief essay discussing your academic and professional goals.



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# 2007–2008 FELLOWSHIPS FOR MINORITY DOCTORAL STUDENTS

## Reference Form

**Part 1. To be completed by applicant. Please TYPE or print all responses.**

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

I agree that the reference I am requesting shall be held in confidence by the American Institute of Certified Public Accountants, its officials and agents, and I hereby waive any rights to examine it.  Yes  No

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

Name of Reference: \_\_\_\_\_

Organization and Title: \_\_\_\_\_

Address: \_\_\_\_\_

**Part 2. To be completed by reference.**

Name and telephone number: \_\_\_\_\_

How long and in what capacity have you known the applicant? \_\_\_\_\_

Are you aware of the applicant's academic record?  Yes  No

Do you feel the applicant is prepared academically for the challenges of a doctoral program?  Yes  No

Do you feel the applicant is prepared emotionally for the challenges of a doctoral program?  Yes  No

Please assess the applicant in the following areas and indicate the reference group used for your judgments (i.e., employees, students):

	Excellent	Good	Average	Poor	Can't judge
Written communication skills					
Verbal communication skills					
Quantitative skills					
Problem-solving skills					
Decision-making skills					
Ability to work with others					

# AICPA MINORITY DOCTORAL FELLOWSHIPS

## 2007–2008 Application

Reference group: \_\_\_\_\_

Name: \_\_\_\_\_

If English is not the applicant's native language, please comment on his/her oral and written English proficiency: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Summary Evaluation:** Please indicate your overall recommendation for this applicant:

- Highly recommended     Recommended     Recommended, with reservation     Not recommended

In the space below or on a sperate sheet of paper please provide a written evaluation of the applicant for the Selection Committee. Your candid assessment of the applicant's potential for success as an accounting educator would be most helpful to the committee in their selection process.

Reference's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Please return this reference form to the candidate. Thank you.*



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# 2007–2008 FELLOWSHIPS FOR MINORITY DOCTORAL STUDENTS

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Please assess the applicant in the following areas and indicate the reference group used for your judgments (i.e., employees, students):

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*Please return this reference form to the candidate. Thank you.*



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# AICPA MINORITY DOCTORAL FELLOWSHIP APPLICATION

## Financial Information 2007–2008 Estimated Budget

Name: \_\_\_\_\_

<b>Family Income</b>	<b>2007-2008</b>
1. AICPA Fellowship	\$ _____
2. KPMG Fellowship	_____
3. Other Fellowships/Funding:	
Other 1 (Name)	
Other 2 (Name)	
4. Spouse Income	_____
5. Savings	_____
6. Other	_____
<b>Total Family Income</b>	<b>\$ _____</b>
<b>Family Expenses</b>	<b>2007-2008</b>
1. Tuition and Fees	\$ _____
2. Books and Materials	_____
3. Housing, Utilities, etc.	_____
4. Food	_____
5. Commuting & Transportation	_____
6. Automobile	_____
7. Childcare/Children's Expenses	_____
8. Insurance	_____
9. Travel	_____
10. Clothing	_____
11. Miscellaneous	_____
12. Spouse Expenses	_____
13. Other 1 (detail)	_____
14. Other 2 (detail)	_____
<b>Total Family Expenses</b>	<b>\$ _____</b>
<b>Excess/(Shortfall)</b>	<b>\$ _____</b>