



**Describe your current professional setting and how you use or apply TA.**

**How will the grant be used? Identify the training program in which you will be participating. How did you decide on this program?**

**How do you imagine you will be different, personally and professionally, as a result of your participation in this program?**

**How do you currently participate in the ITAA or affiliate organization? How do you see yourself participating in the future as a result of acquiring advanced training?**

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

# FINANCIAL STATEMENT

NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_  
(FIRST - MIDDLE - LAST) (MONTH - DAY - YEAR)

Occupation: \_\_\_\_\_

Employed by: \_\_\_\_\_

Spouse's Occupation / Employer: \_\_\_\_\_

Number of Dependents you count as Income Tax Exemptions: \_\_\_\_\_

## APPLICANT'S ANNUAL INCOME & EXPENSES

	Year 20__	Year 20__	Year 20__
	Prior to	Prior of	Following
	Application	Application	Application (Estimate)
<b>A. Total Taxable Income</b>	\$	\$	\$
<b>B. Business Expenses</b>	\$	\$	\$
<b>C. Adjusted Taxable Income</b> <i>(A minus B)</i>	\$	\$	\$
<b>D. Nontaxable Income</b> <i>(i.e., social security, veteran benefits, welfare, alimony, child support, etc.)</i>	\$	\$	\$
<b>E. Spouse / Partner Income</b>	\$	\$	\$
<b>F. Total Income</b>	\$	\$	\$
<b>G. Living Expenses</b>	\$	\$	\$
<b>H. Income Tax</b> <i>(Federal/State)</i>	\$	\$	\$
<b>I. Emergency Expenses</b>	\$	\$	\$

**APPLICANT'S ASSETS AND LIABILITIES**

**HOME (if owned)**

Year Purchased: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**OTHER REAL ESTATE**

Year Purchased: \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**AUTOMOBILE**

Year: \_\_\_\_\_ Model \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**RESOURCES**

**Savings:** \$ \_\_\_\_\_ **Other:** \$ \_\_\_\_\_

(ENDOWMENTS, TRUSTS, GRANTS, SCHOLARSHIPS, INVESTMENTS, ETC.)

**INDEBTEDNESS**

Loan amount to be paid in year of application: \$ \_\_\_\_\_

(MORTGAGE, CAR LOAN, PRIOR MEDICAL DEBTS, SCHOOL LOANS, ETC.)

**COMPLETE IF APPLYING FOR TRAINING**

**TOTAL TRAINING EXPENSES**

	Year 20__	Year 20__	Year 20__
	Prior to	Prior of	Following
	Application	Application	Application
			(Estimate)
<b>A. TA Training Program</b>	\$ _____	\$ _____	\$ _____
<b>B. Special Workshop Tuition</b>	\$ _____	\$ _____	\$ _____
<b>C. Contract Filing Fees and Exam Fees</b>	\$ _____	\$ _____	\$ _____
<b>D. Books and Supplies</b>	\$ _____	\$ _____	\$ _____

Specify TA workshop or training program you wish to attend: \_\_\_\_\_

\_\_\_\_\_

Training Grant Request: \$ \_\_\_\_\_

**COMPLETE IF APPLYING FOR CONFERENCE FEE GRANT**

Specify conference you wish to attend: \_\_\_\_\_

Purpose for attending conference: \_\_\_\_\_

Registration Fee: \$ \_\_\_\_\_

**Total Grant Requested: \$** \_\_\_\_\_

**Total Grant =** Training Grant + Registration Fee Grant + Membership Fee Grant

**Please Note:** The Total Grant Requested may not exceed \$1200 per year with a maximum grant of \$3600 over a 3-year period.

**APPLICANT CERTIFICATION**

"I certify that all information I have provided in this application is true and correct as of the date set forth opposite my signature."

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

**SCHOLARSHIP GRANT FUND STATEMENT BY SUPERVISOR**  
*To Be Completed by Supervisor and Forwarded to ITAA Separately*

**Supervisor's Name:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Applicant's Name:** \_\_\_\_\_

1. How long have you known the applicant? \_\_\_\_\_
2. How long has the applicant been in training with you? \_\_\_\_\_
3. Please comment on the applicant's strength and unique qualities.

4. Please assess the applicant's potential contribution to the ITAA.

5. Please assess your level of endorsement for this grant.

6. How are you, as applicant's Supervisor (or your institute), helping to support the applicant financially?

7. How will you, as applicant's Supervisor (or institute) promote the ITAA to the applicant?

**Supervisor's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_