



Case for Support

Mission

To inspire and encourage individuals to become CPAs who embrace the core values of the accounting profession and serve the public interest.

Vision

A thriving and inclusive accounting profession that creates a stronger economy, business environment and CPA community in Ohio.

History & Track Record

For nearly 60 years, The Ohio CPA Foundation has worked in partnership with The Ohio Society of CPAs to provide opportunities for students to explore accounting career paths and understand the benefits and opportunities that come with the CPA credential. The Foundation's programs position CPAs as role models in the classroom and in their communities to inform, motivate and inspire students to consider rewarding careers in the accounting profession.

The Foundation also supports Ohio's accounting majors through its College Scholarship Program which helps the next generation of CPAs to complete their accounting education with less financial burden. In just the last decade, the Foundation has awarded more than \$400,000 in scholarships.

The Ohio CPA Foundation is dedicated to strengthening the future of the accounting profession. With support from the CPA community and organizations committed to helping advance the Foundation's mission, The Ohio CPA Foundation is achieving its goals and positively impacting individuals and the profession in Ohio.

Strategic Planning

It is no secret that the CPA profession is aging as the massive Baby Boomer generation is on the cusp of retirement. Moreover, competition for the best and brightest talent has never been higher with the increase of STEM (science, technology, engineering and math) education and programming combined with the decline of high school graduates in Ohio. The Ohio CPA Foundation is on the forefront of these trends and is funding programs and creating experiences that showcase the profession and all it has to offer to Ohio's youth.

Strategically, the Foundation focuses on developing the next generation of Ohio CPAs through scholarships and programs to ensure the continued high level of public confidence the profession currently enjoys.

Current Impact & Programs

Reaching students at critical points in their education – as they are making decisions about college, a degree, and a future career – is the focus of Foundation funding priorities. Beginning with career-awareness initiatives through college graduation when accounting graduates become CPA Exam candidates, the Foundation plays a critical role in advancing the pipeline to the CPA profession with talented and diverse individuals.

The Foundation currently funds programs aimed at students in high school, community colleges, and four-year colleges and universities. By expanding our reach to these student groups and beyond to include accounting graduates, the Foundation will have the opportunity to more effectively and directly increase the number of candidates pursuing the CPA Exam and license.

The Foundation's programs are grounded in three critical areas most relevant to the profession's future talent needs:

Career Success Skills

Preparing students to be successful professionals in the businesses and organizations that will employ them; includes financial literacy

CPA Credential & CPA Core Values

Positioning the CPA credential as the gold standard in business and attracting candidates who will embrace and uphold the profession's core values

Diversity & Inclusion

Encouraging individuals from all backgrounds to pursue accounting careers so that the profession better reflects the communities it serves

High School Accounting Career Days

As students make the transition from high school to college, they often have many unanswered questions about what ‘they want to do with their lives.’ This program reaches students who are preparing for college and offers them an opportunity to learn firsthand about the breadth of options that are open to them in the accounting profession. By capturing the attention and imaginations of these talented students before they enter college or decide on a major field of study, the Foundation is paving the professional pathway for CPAs in the state.

ACAP-Ohio: Accounting Careers Awareness Program

Presented in partnership with The Ohio Society of CPAs and the National Association of Black Accountants, and hosted by The Ohio State University’s Fisher College of Business, ACAP-Ohio is designed specifically for minority high school students. The immersive week-long summer program brings together students from throughout the state to share in the experience. ACAP-Ohio students are introduced to a variety of careers in accounting and network with minority CPAs and business leaders. ACAP-Ohio seeks to recruit the best talent from all backgrounds so that the profession better reflects the communities it serves.

*“ACAP-Ohio was extremely instrumental in opening my eyes to the possibilities that accounting holds. **Thanks to ACAP-Ohio, I am now an aspiring CPA majoring in accounting at The Ohio State University.**”*

Sparkle Prater, ACAP-Ohio Class of 2012

ASPIRE!

Many outstanding students do not, or cannot, take a direct path from high school to a four-year college, yet they are often just as talented as their peers who are in a position to do so. The goal of the ASPIRE! program is to directly reach students currently enrolled in community colleges or two-year institutions who are interested in pursuing a degree and career in accounting. At the ASPIRE! events, students have an opportunity to meet with CPAs, accounting professionals and faculty in order to learn more about opportunities within the profession and the importance of the CPA credential.

College Scholarship Program

The Foundation understands that one of the best ways to motivate a person toward excellence is to recognize the accomplishments they have already achieved and challenge them to continue their efforts. The Foundation’s College Scholarship Program does just that by providing financial support to outstanding students who are pursuing their accounting degree and aspire to become Ohio’s next CPAs.

Student Ambassador Program

The Ohio CPA Foundation's Student Ambassador Program employs the power of peer-to-peer influence to reach students who have not yet declared a major with information about accounting and the CPA profession. Student Ambassadors also connect with their peers – fellow accounting majors – with information about the CPA Exam and the benefits of licensure. The program now operates at 15 of Ohio's 34 four-year institutions that offer an accounting degree program.

*"As Student Ambassador, I became an easily recognizable face on campus. The events and presentations I held **broke down stereotypes and helped more people think about joining accounting** or supporting our program. Having a peer resource for students is of great value."*

Brandon Yanak, 2013-14 Student Ambassador, Wright State University

ASCEND Leadership Conference

The ASCEND Leadership Conference is an all-expenses paid two-day experience geared to motivate and advance ethnically diverse college students working to pursue their accounting degree. The event aims to strengthen professional skills and highlight the limitless possibilities and benefits of a career as a Certified Public Accountant.

Participants hear from expert leaders and engage in interactive sessions to:

- Improve leadership skills and increase self-confidence
- Learn strategies for enhancing professional success
- Prepare for the steps that follow graduation
- Gain a clear vision for becoming a workplace team leader
- Obtain knowledge of how to succeed as a CPA

Ways to Give

The Ohio CPA Foundation's Annual Fund Campaign welcomes financial support from individuals and organizations in a variety of ways, including gifts of cash, stock, and bequests. Unrestricted gifts to the Foundation's Annual Fund are deeply appreciated, but Annual Fund gifts may also be designated toward a specific program.

There are also several other major gift opportunities within the Foundation for those donors wishing to significantly advance one or more Foundation programs. In these cases, Foundation staff will work to ensure that a donor's intentions align with the Foundation's mission so that maximum impact can be achieved.

Cash Gifts

- **One-Time Contributions:** The Foundation can accept personal checks, electronic bank transfers and credit card authorizations.
- **Pledged Commitments:** You may choose to make a 'pledge' to the Annual Fund early in the year, then fulfill it by December 31 based on the schedule you indicate. In addition, you may make a multi-year commitment to the Annual Fund or a major gift to a particular area (program support, endowment, etc.) and fulfill the pledge over a five year period. Reminders will be sent annually or on a schedule you determine.
- **Marketable Securities:** The Foundation can accept gifts of stock transfers of appreciable value. Gifts of readily marketable securities will be sold immediately upon transfer of ownership to The Ohio CPA Foundation. These charitable gifts will be valued at fair market value (the average market value of the stock on the date of transfer).

Major Gifts

The Foundation has the flexibility to design major gift opportunities according to a donor's specific interest.

Program Underwriting – These major gifts involve multi-year support to fully or partially fund a current or new Foundation program, potentially restricted to a particular geographic region within Ohio. Such arrangements will afford the donor appropriate recognition and linkage with the program.

Named Endowments – These major gifts will establish a permanent fund in the name of the donor (or designee), the interest income from which will fund a particular program or scholarship. Establishing a named endowment will require a minimum gift of \$25,000, and must be fully funded within five years.

Legacy Gifts

A legacy gift, or planned gift, is a wonderful opportunity to support The Ohio CPA Foundation – **and have a lasting impact on the profession** – for years to come. Bequests, or gifts made through your will, and beneficiary designations, which do not require a will to accomplish, are powerful and meaningful ways to create a philanthropic legacy that will cost you nothing during your lifetime (updating a will can involve attorney fees, however).

Please contact Foundation staff to learn more about Legacy Gifts to The Ohio CPA Foundation at (800) 686-2727.

*“The Ohio CPA Foundation is all about investing in our future. As a CPA on the “back nine” of my career (to paraphrase Rory McIlroy), this is very important to me personally. **The “investments” we make through The Ohio CPA Foundation are focused on attracting diverse and high-performing students to careers as CPAs and in improving the knowledge and understanding of core financial concepts by the general public.**”*

Dave Simko, CPA, partner at EY Cleveland and Ohio CPA Foundation Trustee

Donor Recognition

The Ohio CPA Foundation is pleased to recognize the growing number of donors who are investing in the CPA profession through the Annual Fund Campaign and through other special giving opportunities. Our calendar-year based Annual Fund Campaign recognition program is structured as follows:

Benefactor: \$5,000

- Special recognition at OSCPA's Leadership Summit & Annual Meeting
- Invitation to attend a Foundation program's reception, banquet or event
- Invitation to a donors' reception with Foundation Trustees
- Recognition on the Foundation's Honor Roll donor listing at OSCPA events
- Recognition on the Foundation's web site at www.ohiocpafoundation.org
- Recognition in the Foundation's annual report
- Quarterly Foundation updates from the Board Chair and Executive Director

Champion: \$2,500

- Invitation to attend a Foundation program's reception, banquet or event
- Invitation to a donors' reception with Foundation Trustees
- Recognition on the Foundation's Honor Roll donor listing at OSCPA events
- Recognition on the Foundation's web site at www.ohiocpafoundation.org
- Recognition in the Foundation's annual report
- Quarterly Foundation updates from the Board Chair and Executive Director

Leader's Circle: \$1,000

- Invitation to a donors' reception with Foundation Trustees
- Recognition on the Foundation's Honor Roll donor listing at OSCPA events
- Recognition on the Foundation's web site at www.ohiocpafoundation.org
- Recognition in the Foundation's annual report
- Quarterly Foundation updates from the Board Chair and Executive Director

Pacesetter: \$500

- Recognition on the Foundation's Honor Roll donor listing at OSCPA events
- Recognition on the Foundation's web site at www.ohiocpafoundation.org
- Recognition in the Foundation's annual report
- Quarterly Foundation updates from the Board Chair and Executive Director

Advocate: \$250

- Recognition on the Foundation's web site at www.ohiocpafoundation.org
- Recognition in the Foundation's annual report
- Quarterly Foundation updates from the Board Chair and Executive Director

Friend: \$100

- Recognition in the Foundation's annual report
- Quarterly Foundation updates from the Board Chair and Executive Director

Leadership & Continuity

The Ohio CPA Foundation is led by a Board of Trustees comprised of members of The Ohio Society of CPAs and the public. By providing oversight, guidance and counsel to ensure the Foundation's programs stay true to its mission and vision, these individuals demonstrate their own personal commitment to the future of the CPA profession.

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The Ohio CPA Foundation, the 501(c)(3) charitable affiliate of The Ohio Society of CPAs, is a GuideStar Exchange Gold Participant. EIN 31-6052485

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