



Haven Foundation Financial Aid Information Pack

Thanks to the generosity of many donors, Haven Foundation has granted over half a million dollars in financial aid to more than 500 adults and children since 2004. We believe that The Haven's programs offer life-enriching experiences, and we seek to offer support for those who may be prevented from participating due to a lack of financial resources.

Each application for financial aid is treated confidentially and considered with care and respect. The funds for our financial aid program come exclusively from donors and are limited, so we are not able to assist everyone who applies.

Please take the time to thoroughly read this information before filling out your application.

1. DEFINITIONS

Bursary – funding to cover a program, and also possibly meals and accommodation, which is not paid back to The Haven. A bursary typically covers up to 80% of the costs associated with a program. A Bursary is considered 'income' by Canada Revenue Agency so you will be issued a T4A at year end for your tax filing purposes.

Loan – an interest free loan which typically covers up to 80% of a program, and also possibly meals and accommodation, which is paid back to The Haven in agreed monthly installments (see point 4 below).

Financial aid is not provided in cash. A bursary or loan is a credit towards tuition, accommodation and/or meals.

2. ELIGIBILITY

Eligibility is determined on financial and personal needs – if you meet the financial eligibility criteria, your application will be further evaluated on personal need.

3. DEADLINE

The Financial Aid Manager must receive your completed application **one calendar month before the start date of the program**. The Financial Aid Manager will contact any applicant submitting a form after the deadline to advise of the next available program for which a bursary or loan may be available. You will be contacted **two weeks before the start date of the program** to inform you if your application has been successful.

4. LOAN REPAYMENT

We prefer that any loan is repaid within six months of the start date of the program and repayments are no less than \$150 dollars per month and there have been exceptions to this, so let's talk about what will work for you. We will provide you with a payment plan and debit the repayment amount directly from your bank account. **Please bring a void cheque with you when you come to the program.**

5. PROGRAMS

We provide most of our financial aid for our Come Alive and Living Alive Phase I and II programs. Depending on individual circumstances, we provide financial aid for the whole 25 days of a Living Alive Phase program, or for parts A or B. Applications for financial aid for other programs are approved on a case-by-case basis and may cover 50% of tuition fees only.

6. RESTRICTIONS

- All applications are subject to the availability of funding. We restrict financial aid applications for Come Alive and Living Alive Phase programs to a maximum of 80% of the tuition fee (and accommodation and meal costs if required). Financial aid for 100% of costs for these programs is only considered in cases of extreme financial hardship. Applications for financial aid for other programs are approved on a case-by-case basis and may cover 50% of tuition fees only. All remaining costs are covered by the recipient.
- We normally restrict applicants to one bursary or loan award within a calendar year (subject to eligibility and availability of funding). There is one exception to this restriction. If you wish to apply for a bursary or loan for Living Alive Phase I or Living Alive Phase I part A in the same calendar year as you have received financial aid for a Come Alive, we will accept a second application for financial aid. This application will go through the normal approval procedure and will be subject to eligibility and availability of funding. In subsequent years, preference may be given to those individuals who have not previously received a bursary or loan through Haven Foundation Financial Aid.
- If you are applying for financial aid for a 25-day Living Alive Phase program, we would normally expect you to have already done a Come Alive or other program at The Haven.
- We do not provide financial assistance for travel costs, or any other costs associated with traveling to and from The Haven.
- Financial aid is not transferable between programs. Financial Aid is provided for the program that you have indicated in Part 1 of this form – if you are granted a bursary or loan and cannot use it for whatever reason, you will need to reapply for financial aid for any program in the future.

7. PRIORITIES

While all applications will be considered, priority will be given to providing support to applicants in severe financial and emotional need. All applications are subject to the availability of funding.

8. GUIDELINES

Please follow these guidelines to ensure that your application is processed correctly:

- Answer all questions fully and completely.
- Write legibly – typewritten submissions are preferable (but not essential)
- Make sure the application is complete and all additional information is included – e.g. financial information (tax returns, bank statements – see part 3), written letters of personal and financial references (see part 4).
- Make sure that the Financial Aid Manager receives your application no later than **one calendar month before the start date of the program**.
- The more information you provide, the easier it is for us to assess your application.

9. GIVING BACK TO THE HAVEN

All financial aid recipients are encouraged to give back to The Haven in whatever way works for them. After the program we would welcome a written testimonial describing your experience of the program. We are also compiling a database of stories from recipients, so if you are willing to share the story of your own personal journey, a Haven staff member will interview you. By choosing to give back in this way, you will help us in our fundraising efforts. The testimonial or story can be done anonymously.

For more information on this and other ways to give back, please contact Louise Amuir louise@haven.ca

Haven Foundation Financial Aid Application

PART 1 – REQUEST

Name of applicant	
Contact telephone number	
Name of program	
Date of program	

The Financial Aid Manager must receive your completed application **one calendar month before the start date of the program**. The Bursary Manager will contact you **two weeks before the start date of the program** to inform you if your application has been successful.

Type of Financial Aid requested:

- Bursary
 Interest free loan
 Combination of Bursary and Interest free loan

A bursary typically covers up to 80% of the costs associated with a program like Come Alive or Phase, including meals and accommodation. Other programs are eligible for bursaries of 50% of tuition. A bursary is considered 'income' by Canada Revenue Agency so you will be issued a T4A at year end for your tax filing purposes.

When granting financial aid we request that all recipients contribute as much as they can towards the cost of a course. We believe that by making a personal investment, the bursary recipient's level of commitment and participation is greatly enhanced. Everyone contributes something.

Amount you are able to contribute to the program fees.	
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Repayment amount (for loans only)

Please indicate the <u>maximum amount</u> per month you are able to repay (see Information Pack part 4).	\$_____ per month
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Accommodation and Meals:

Will you require accommodation during the program?	YES/NO
Will you require meals during the program?	YES/NO
Do you have any other needs? (i.e. ground floor room etc.)	YES/NO

If you have any special needs, please describe: _____

If you have received a bursary or loan from The Haven before, please give details below. (See Information Pack part 6).

Date of Program	Name of program

PART 2 – PERSONAL INFORMATION

Applicant name	
Gender	
Date of Birth (MM/DD/YYYY)	
Address	
City	
Province/State	
Postal / Zip Code	
Telephone home	
Telephone work	
Email	
Who referred you to The Haven?	
Current Employer	
Employer's address	
City	
Province/State	
Postal/Zip code	
Your position	
Salary (per hour or month)	
Social Insurance Number*	

**** We require your SIN because you are required to report bursaries as income. We will issue a T4A for your tax filing purposes.***

PART 3 – FINANCIAL INFORMATION

Please complete the table below to provide us with an outline of your monthly income and expenses.
Please include the following financial documents to verify your financial situation:

1. **Your tax assessment for the previous year.**
2. **2 months of bank statements showing daily transactions.**
3. **Statements of assets, RRSPs, other statements that will be helpful in assessing your financial situation**

Monthly income:

Income	Amount CAD\$	Description
Take home pay (net income per month)		
If applicable – take home pay for your partner/spouse		
Business/investment income or assets (e.g. rent, business income, interest, dividends, stocks, bonds, RRSPs)		
Government assistance (e.g. pension benefits, EI, disability allowance, child and family benefits, tax refunds)		
Other income (please specify)		
Total monthly income		

Monthly expenditures:

Expenditure	Amount \$CAD
Rent/mortgage	
Food	
Gas	
Entertainment	
Personal Expenses	
Heat	
Telephone	
Cable	
Internet	
Car Insurance	
Car Payments	
Other transportation	
Contributions (e.g. RRSP)	
Childcare	
Debt servicing	
Medical/dental coverage	
Total monthly expenditure	

TOTAL MONTHLY INCOME MINUS TOTAL MONTHLY EXPENDITURE	\$
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We will contact your personal and financial references by telephone to confirm the information they have provided.

Please Note: By providing a Personal and Financial Reference, you are agreeing that we may contact the people whose names you have provided above. During the program of verifying the information that you have provided, the content of your application will be discussed, as deemed appropriate.

Personal reference

The personal reference should be someone who has known you for some time and who is able to verify the information you have provided in the personal statement above. The personal reference should:

1. Give details of how long the reference has known you.
2. Verify the information in the personal statement.
3. Include any additional information relevant to your application for financial aid.

Please attach your personal letter of reference on a separate sheet with this application and include it in with the form in the envelope if you are sending it by mail, or ensure that it is faxed together with the rest of the form.

Name of reference	
Telephone number of reference	

Financial reference

The purpose of the financial reference is to verify the information you have included in part 3 of this application form. Your financial reference should come from someone who knows you well enough to understand and explain your financial circumstances (for example a close family member, co-worker or employer). The financial reference should:

1. Give details of how long the reference has known you.
2. Give details of how the reference knows about your financial situation.
3. Verify the information in the financial information section.
4. Include any additional information relevant to your application for financial aid.

Name of reference	
Telephone number of reference	

Please attach your financial letter of reference on a separate sheet with this application and include it in with the form in the envelope if you are sending it by mail, or ensure that it is faxed together with the rest of the form.

I certify that all of the above information is true and correct and that all income is reported. Any omissions or inaccurate information could jeopardize my application and entitle The Haven to claim the repayment of all financial aid provided.

I understand that this information will be kept strictly confidential and is only used in determining my eligibility for financial aid.

I agree that the information in this form may be shared with the leaders of the program for which I am applying.

Signature: _____

Date: _____

Return this form to:

Attention: Louise Amuir
Haven Foundation Financial Aid Program
240 Davis Road
Gabriola, BC
V0R 1X1

Fax for the attention of Louise Amuir: 250 247 8454

Thank you for your application. If you have any questions or require additional information, please contact Louise Amuir at 1 877 247 9238, extension 222.

Please check that the following is included:

- Tax assessment
- Bank statements
- Personal statement
- Personal reference
- Financial reference
- Signature on this page

If you don't have a bank account or if you need help filling out the form, please call 1 877 247 9238 extension 222 or email louise@haven.ca