




Investing in the Future

FACES OF THE FUTURE

Building the CPA profession





The Ohio CPA Foundation plays a critical role in advancing the pipeline to the CPA profession with talented and diverse individuals.

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

Career Success Skills

Preparing students to be successful professionals in the businesses and organizations that will employ them

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

IMPACT



Students today are the CPAs of tomorrow. They are the future financial business leaders, consultants and advisors. But how will they know if a career in accounting is right for them?

The Ohio CPA Foundation creates opportunities for students to:

- Get an inside look at the profession
- Meet CPAs and learn about career paths they may have never considered
- Be inspired to pursue an accounting degree and become a CPA

Since 1956, The Ohio CPA Foundation has worked in partnership with The Ohio Society of CPAs to provide scholarships and opportunities for students to explore accounting career paths and understand the benefits and opportunities that come with the CPA credential.

The Foundation currently funds programs aimed at students in high school, community colleges, and four-year colleges and universities. Annually, the Foundation reaches more than 500 high school students and thousands of college students through its career awareness initiatives. Nearly \$50,000 is awarded each year to accounting students statewide through the College Scholarship Program.

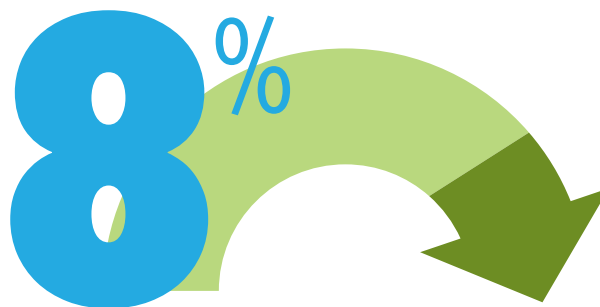
The Ohio CPA Foundation is committed to showcasing the accounting profession and all it has to offer to inspire students today to become the next generation of CPAs.

STRATEGIC FOCUS



Competition for talented accounting graduates is on the rise as America prepares for the surge of Baby Boomer retirements. An increase in STEM (science, technology, engineering and math) education and programming in high schools, coupled with smaller graduating classes, also is diverting students' interest to a host of other careers, making The Ohio CPA Foundation's work critically important.

The Foundation's programs connect students with CPAs who demonstrate all the profession can offer Ohio's youth. Through academic scholarships and career awareness programs, The Ohio CPA Foundation helps students choose the path to rewarding, lifelong careers.



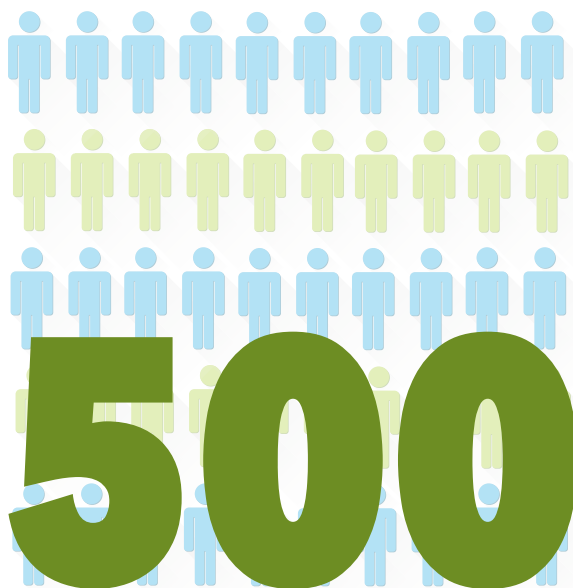
Projected decline in Ohio's high school graduates by 2023,
which increases competition for the best and brightest students

(Source: WICHE, Knocking at the College Door, 2013)

PROGRAM LINEUP

HIGH SCHOOL ACCOUNTING CAREER DAYS

As students transition from high school to college, they often have unanswered questions about what they want to do with their lives. High School Accounting Career Days reach students who are preparing for college and introduce them to the breadth of options in the accounting profession. By capturing the attention of students before they decide on a major field of study, the Foundation is paving the professional pathway for future CPAs.



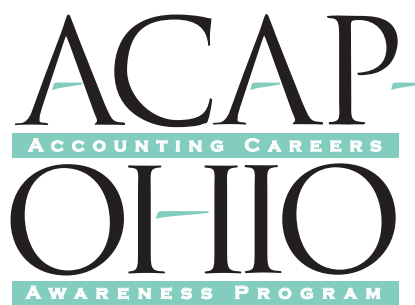
Students and teachers attended High School Accounting Career Days in 2014-15



"At the High School Accounting Career Day, my students are always amazed to learn what an accountant really does. We take that back to the classroom and turn it into additional learning activities for them."

*Jane Briggs, teacher
Eastland Career Center, Groveport*

PROGRAM LINEUP

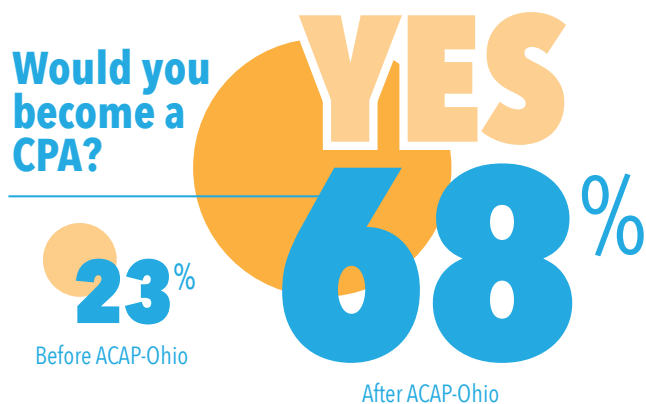


ACAP-OHIO: ACCOUNTING CAREERS AWARENESS PROGRAM

Presented in partnership with The Ohio Society of CPAs and the National Association of Black Accountants, ACAP-Ohio is a week-long summer program for Ohio minority high school students. ACAP-Ohio students are introduced to a variety of careers in accounting and network with minority CPAs and business leaders. The program recruits 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



(Source: ACAP-Ohio 2015 Student Survey)

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 ASPIRE! events, students meet with CPAs, accounting professionals and faculty and learn about the profession and the value of earning the CPA credential.

ASCEND LEADERSHIP CONFERENCE

The ASCEND Leadership Conference is an all-expenses paid, two-day experience designed to support and advance ethnically diverse college students working to earn an accounting degree. The conference strengthens students' professional skills and highlights the limitless possibilities and benefits of a career as a CPA. Participants hear from expert leaders and engage in interactive sessions to improve leadership skills, prepare for the steps following graduation and connect with recruiters and practicing CPAs.



"(ASCEND) was above and beyond what I expected. I can definitely say that after going to ASCEND it really increased my interest in going for my CPA."

Lekeya Paige
Franklin University, ASCEND 2015

PROGRAM LINEUP

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.



"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*



Participating Universities

- | | |
|------------------------------------|---------------------------------|
| 1. Ashland University | 10. The Ohio State University |
| 2. Bowling Green State University | 11. The University of Akron |
| 3. Case Western Reserve University | 12. The University of Toledo |
| 4. Cleveland State University | 13. University of Cincinnati |
| 5. Hiram College | 14. University of Dayton |
| 6. John Carroll University | 15. Wright State University |
| 7. Kent State University | 16. Xavier University |
| 8. Miami University | 17. Youngstown State University |
| 9. Ohio University | |



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.

\$50K

Awarded annually in college scholarships by the Foundation



"Receiving The Ohio CPA Foundation scholarship is a remarkable honor. Because of the generosity of others, I will be able to use this award to further my education. After graduation, I plan to sit for the CPA Exam and will be joining the audit practice of Deloitte & Touche."

*John "JJ" Erickson
2014 Statewide Scholarship Recipient*

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 choose. 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.

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, are powerful and meaningful ways to create a philanthropic legacy.

Please contact Foundation staff to learn more about planned giving opportunities and the **1956 Legacy Society** at 614.764.2727.



"I challenge members to think about the rewarding career they've had and pay it forward to a profession that's provided wonderful opportunities for employment and learning."

*George Bethea, CPA
OSCPA member and annual Foundation donor*

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

614.764.2727 | www.ohiocpa.com/foundation