

CPA Atlantic School of Business

Official Transcript Evaluation Request Form for Applicants in Atlantic Canada and Bermuda

The purpose of this official transcript report is to precisely assess eligibility for the CPA Professional Education Program (CPA PEP) and identify course exemptions from the required prerequisite topics (see **CPA Atlantic Prerequisite Equivalency Chart** at cpaatlantic.ca).

An official evaluation is **required** for all registrants to the CPA Prerequisite Education Program (CPA PREP) as well as all registrants to the CPA PEP. CPA Atlantic strongly advises having your official transcripts assessed prior to CPA PREP or CPA PEP registration so as to be certain of eligibility status and best plan for the maximum number of course exemptions.

PLEASE CHECK HERE IF YOU ARE COMPLETING THIS FORM IN HOPES OF CONDITIONAL ADMITTANCE

SECTION A- *To be completed by all applicants*

PERSONAL INFORMATION

First name:

Middle name:

Last name:

Former legal name (under which degrees may have been granted)

Date of birth (MM/DD/YEAR):

Gender:

Preferred language for official correspondence

M

F

English

French

Country of residence:

CPA students and candidates residing in Canada must be eligible to study in Canada. If applicable, please indicate your Canadian study eligibility below:

Canadian Citizen

Permanent resident

Landed immigrant

Study permit, number: _____

not applicable, I reside in: _____

HOME CONTACT INFORMATION

Street address:

City/Municipality:

Province/State/Parish:

Country:

Postal/zip code (no spaces)

Primary phone number(XXX) XXX-XXXX:

Secondary phone number (XXX) XXX-XXXX:

Preferred email:

Secondary email:

EMPLOYMENT INFORMATION

Your work title/position:

Company name:

Street address:

City/Municipality:

Province/state/parish:

Country:

Postal/zip code (no spaces)

In Canada and Bermuda, a number of companies including many accounting firms, have registered as CPA approved training offices (ATOs). To the best of you knowledge, are you employed by an ATO.

Yes

No

Not sure

If yes, please indicate the name of your student administrator:

TRANSCRIPT ASSESSMENT

Admission to the CPA Professional Education Program (CPA PEP) requires a completed university degree and specific subject area coverage. To confirm eligibility, CPA Atlantic School of Business requires official transcripts. To be considered official, transcripts must be sent directly to our office from the issuing institution by mail. This includes both universities as well as professional associations. If an official transcript is unavailable at this time, enclose the most-recent unofficial transcript until official transcripts can be forwarded. In these cases, application status will be provisional, pending receipt of official transcripts.

If a student is requesting a transcript evaluation of the grounds of conditional admittance for the CPA Professional Education Program (PEP), it should be noted that additional materials will be required to verify their current academic studies at an accredited post-secondary institution. Preliminary unofficial transcripts, should be followed by a pending graduation letter from their university and a second copy of unofficial transcripts upon the release their final grades. Once a student is enrolled in CPA PEP conditionally, it is their responsibility to provide official, sealed transcripts in an appropriate time-frame, or face deferral and related deferral fees. Should an applicant be accepted on conditional admittance and not meet the minimum grade requirements for their current course(s) in progress, their conditional admittance will be revoked and the applicant will be subject to an administrative fee.

*** Eligibility will not be assessed until all official documents are received, unless a basis for conditional admittance has been established.**

STUDY HISTORY

In the following section, please list all post-secondary institutions you have attended.

Please note: Further details may be requested regarding universities/institutes and courses from universities outside of Canada, the US, and Bermuda.

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Institution #1 - Name:

Province/region/country:

Program of study:

Degree/diploma

Year conferred (or expected):

Granted

In progress (or prerequisite coursework)

Incomplete (not intending to complete)

STATUS OF TRANSCRIPT

Unofficial copies of transcript attached

Arrangements are in process to have official transcripts sent directly from institution

Official transcripts were previously forwarded

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Institution #2 - Name:

Province/region/country:

Program of study:

Degree/diploma

Year conferred (or expected):

Granted

In progress (or prerequisite coursework)

Incomplete (not intending to complete)

STATUS OF TRANSCRIPT

Unofficial copies of transcript attached

Arrangements are in process to have official transcripts sent directly from institution

Official transcripts were previously forwarded

Comments or explanations regarding the state of your transcripts:

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Institution #3 - Name:

Province/region/country:

Program of study:

Degree/diploma

Year conferred (or expected):

Granted

In progress (or prerequisite coursework)

Incomplete (not intending to complete)

STATUS OF TRANSCRIPT

Unofficial copies of transcript attached

Arrangements are in process to have official transcripts sent directly from institution

Official transcripts were previously forwarded

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Institution #4 - Name:

Province/region/country:

Program of study:

Degree/diploma

Year conferred (or expected):

Granted

In progress (or prerequisite coursework)

In complete (not intending to complete)

STATUS OF TRANSCRIPT

Unofficial copies of transcript attached

Arrangements are in process to have official transcripts sent directly from institution

Official transcripts were previously forwarded

Official transcripts **must** come directly from the institution and be **sealed/unopened**. Please arrange to have your official transcripts sent to:

CPA Atlantic School of Business
Suite 1306, Cogswell Tower, Scotia Square, PO Box 489
Halifax, Nova Scotia, B3J 2R7
Canada
Attention: Transcript Evaluations

THE SOBEY MBA (CPA-STREAM)

Are you completing submitting this Transcript Evaluation Request as the first-step in your application to the Sobey MBA (CPA Stream) at Saint Mary's University?

Yes No

Please note only those eligible for direct admittance into the CPA PEP program will be allowed to pursue further steps in applying to the Sobey MBA (CPA Stream).

SECTION B- *To be completed only by applicants who have been granted a professional designation or who are under-going a professional designation process*

PROFESSIONAL DESIGNATIONS

Have you previously had your transcripts reviewed by CA, CGA or CMA?

Yes No

If "yes", which Canadian accounting body?

Provincial/regional office:

Year

Were you previously a member of one of the following Canadian accounting designations (including as a student or a candidate member)?

CA CGA CMA No

If "yes", please indicate your previous student number:

PROFESSIONAL STUDIES

Institution #1 - Name:

Province/region/country:

Designation

Year conferred (or expected):

Granted

In progress

Institution #2 - Name:

Province/region/country:

Designation

Year conferred (or expected):

Granted

In progress

*** Please note for each professional designation attained, CPA Atlantic will require an official letter of good standing and official transcripts**

SECTION C- *To be completed by all applicants*

SUBMISSION AND FEE INSTRUCTIONS

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GENERAL NOTES:

- All fees are quoted in CAD\$
 - All fees subject to 15% HST
 - Applicants whose most-recent university degree is from outside of Canada, the US or Bermuda, must complete a World Education Services (WES) Academic Records Request Form. Currently, all fees associated with the WES Form are payable to WES not CPA Atlantic School of Business.
 - All requisite documents (WES, official transcripts etc.), and payments must be received in full before eligibility can be assessed
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STEP 1: SUBMIT FORM

Save this form to your desktop, complete electronically, and return it via **email** to your corresponding **program advisor**:

Nova Scotia:

Shawn Smith, Program and Recruitment Advisor, CPA Atlantic School of Business, ssmith@cpaatlantic.ca

New Brunswick and Prince Edward Island:

Rachelle Gauvin, Program Advisor, CPA Atlantic School of Business, rgauvin@cpaatlantic.ca

Newfoundland and Labrador, Bermuda (and all other provinces/countries other than those listed above):

Courtney Barnhill, Program Advisor, CPA Atlantic School of Business, cbarnhill@cpaatlantic.ca

STEP 2: SUBMIT PAYMENT

Transcript evaluation fee: **\$100 (plus tax)**

Method of payment:

Cheque

Money order

Wire transfer

Choice 1

Please invoice me prior to submitting payment

*** Please note payment via credit card is not available at the moment**

PAYMENT CONTINUED...

Cheques * and **money orders** * should be made payable to **CPA Atlantic School of Business** and mailed to:

CPA Atlantic School of Business
Suite 1306, Cogswell Tower, Scotia Square, PO Box 489
Halifax, Nova Scotia, B3J 2R7
Canada
Attention: Program Payments

* All **cheques** and **money orders** must include your **CPA ID#** (as indicated on your CPA Atlantic transcript- evaluation report)

Wire transfer * details are as follows:

Bank number: 002
Transit number: 70003
Account: 0087 114
Swift code : NOSCATT

Bank of Nova Scotia, Halifax Commercial Banking Centre & Main Branch
1709 Hollis Street
Halifax, Nova Scotia, B3J 1W1

* If paying by wire transfer, please be sure to submit a **confirmation number** to finance@cpaatlantic.ca

Our address (as per the above banking records):

CPA Atlantic School of Business
P.O. Box 489
Halifax, Nova Scotia, B3J 2R7
Canada

Online web transfers:

The online banking option exists currently for **TD Canada Trust, CIBC, BMO** and **Scotiabank** account holders. Payment may be addressed to our **payee** title: **CPA Atlantic**. Please use your **CPA ID** number for your account number.

* **Please note:** *Candidates who have not yet submitted an official transcript evaluation form to CPA Atlantic, or who have not yet received their CPA ID number, will not be able to use online banking for payments.*

HST# R10673647

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TOTAL

Transcript evaluation fee

Addition of 15% HST (applicable to all regions)

Total (including tax) \$

TERMS OF AGREEMENT

Please indicate if you would like to receive program related emails from CPA Atlantic regarding updates on deadlines, payments, information sessions, policy change, etc.

Yes

No

I hereby declare that all information provided in this application is complete and true. I understand that providing inaccurate or incomplete information on this application is grounds for de-registration and suspension.

Signature

[Click here to provide electronic signature](#)

Yes

Date (MM/DD/YY)

Please note: The personal information we collect from you is treated in accordance with local privacy laws