



Waterloo's spirit of innovation continues to cultivate knowledge and ideas that have an impact on local, national, and international communities. Scholarships and awards provide a significant way to recognize students' achievements, reward talented students for their accomplishments, and provide financial support to help them with their educational expenses.

The annual cost of books, tuition, and living expenses ranges from \$18,300 - \$31,800 for the average undergraduate, and is substantially greater for graduate and international students. As government subsidies decrease and the cost of living increases, the need to offer student aid is greater than ever.

Student scholarships and awards funded through donor-directed trusts and endowments help attract and keep the brightest students

### **ESTABLISHING A NAMED SCHOLARSHIP OR AWARD**

The University of Waterloo is proud to recognize our donors' generous support through named scholarships and awards, which a donor can name in honour or in memory of a special person, or in his/her own name.

One hundred per cent of a gift and the matching funds go directly to the donor's named trust, named endowment, or progressive endowment.

#### **NAMED TRUST**

- » Supports a named award for a specific time period
- » Requires a minimum gift of \$10,000 to set up an undergraduate award (i.e., \$2,000 per year for five years to establish an entrance scholarship or \$2,500 per year for four years to establish an upper-year scholarship)
- » Requires a minimum gift of \$20,000 to set up graduate award

#### **NAMED ENDOWMENT**

- » Gifts are invested in perpetuity to create a continuous revenue stream to support chosen program
- » Requires a minimum gift of \$40,000 for an undergraduate award and \$50,000 for a graduate award

#### **PROGRESSIVE ENDOWMENT**

- » Requires a multi-year gift with two components:
  - a trust to allow for immediate award support, and
  - an endowment for sustainable funding source at the conclusion of the pledge.

# Scholarships and awards



*Rewarding bright, talented students for their efforts will not only make a direct impact on their lives, it will also impact our university community as a whole as we follow through with our goal for making the future better for Canada and the world.*

— FERIDUN HAMDULLAHPUR, President and Vice-Chancellor



# Scholarships and awards

## PROGRESSIVE ENDOWMENTS: AN ILLUSTRATION

GIFT DETAILS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6+
Donor Contribution	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	Fully funded endowment in place to sustain an annual award perpetuity
Endowment Allocation	\$8,000	\$8,000	\$8,000	\$8,000	\$8,000	
Award to Student	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	
Fund Balance	\$8,000	\$16,000	\$24,000	\$32,000	\$40,000	

**Year 1-5** Expendable allocation supports one award per year valued at \$1,000

**Years 6+** Endowment income supports one continuing award per year, normally valued at \$1,600 (assuming a 3.5% spending allocation)

## MAXIMIZING YOUR SUPPORT

### » Graduate Student Matching Opportunities

Federal and provincial matching programs may be available to enhance your gift's impact.

### » Corporate Matching

Many corporations will match employee contributions to non-profit or charitable institutions.

A list of matching companies is available at [development.uwaterloo.ca/giftmatch](http://development.uwaterloo.ca/giftmatch)

## OPPORTUNITIES TO MAKE A DIFFERENCE

### » Scholarship

Selection criteria based primarily on academic excellence

### » Bursary

Selection criteria based primarily on financial need

### » Award

Multiple selection criteria, with equal or significant attention given to more than one area (e.g., academic excellence and financial need, academic excellence and community involvement)

### » International Experience Award

- Award selection may be based on academic achievement, leadership, financial need, or a combination of factors
- Funds travel, living costs and/or tuition for study or work in another country

## OFFICE OF ADVANCEMENT

519-888-4567, ext. 32036 | Fax: 519-746-8932

[uwaterloo.ca/support](http://uwaterloo.ca/support)

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