



## 2018-2019 SCHOLARSHIP APPLICATION

The scholarships are made available by the generous support of the FPA of San Francisco and FPA of the East Bay. Please visit their websites to learn more: [fpasf.org](http://fpasf.org) and [fpaeb.org](http://fpaeb.org)

Choose only one:     CFP® Certificant Scholarship         FPA Residency Scholarship

FPA San Francisco and FPA East Bay each offer scholarship(s) to qualified financial planning students annually. Applications are due by January 14, 2019.

Name: \_\_\_\_\_ Employer: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Email: \_\_\_\_\_

CFP® Education Program: \_\_\_\_\_ Degree/Certificate Sought: \_\_\_\_\_

Date of Enrollment: \_\_\_\_\_ Projected Completion Date: \_\_\_\_\_

Projected CFP® Review Course Date: \_\_\_\_\_ Projected CFP® Exam Date: \_\_\_\_\_

Are you currently a member of the FPA? If so, what chapter? \_\_\_\_\_

If not currently which chapter will you join? Circle one: San Francisco / East Bay

For more information: [www.onefpa.org/membership](http://www.onefpa.org/membership)

Are you eligible for employer reimbursement of CFP® education expenses and/or FPA Residency Program costs? \_\_\_\_\_

If so, describe the amounts and timing: \_\_\_\_\_

### Scholarship Eligibility Criteria:

- You must have the intention to take all required courses for the CFP® exam and become a CFP® certificant
- If your employer reimburses 50% or more of the associated costs of your CFP® education or FPA Residency Program, you are not eligible for this scholarship
- You must be a current and continuing Member of FPA and affiliated with either the San Francisco, or East Bay chapter, with a commitment to regularly attend meetings and becoming involved in the chapter.
- You must not have won another FPA or CFP®-related scholarship within the past 24 months

**Please include the following with your application:**

1. Professional resume listing all current and previous employment
2. List any additional professional affiliations, extracurricular activities, achievements and any FPA-related awards and grants received to date.
3. Write a letter or essay addressing the following topics:
  - a. Why have you chosen the financial planning profession?
  - b. What do you feel are the benefits of obtaining the CFP® designation?
  - c. For what purpose will you use these scholarship funds? (CFP coursework, CFP® exam review course, CFP® exam fee, tuition for FPA Residency Program, other)
  - d. What are your career goals over the next five years?
  - e. List any additional comments that you wish to be considered in your application
4. Two letters of recommendation from qualified persons (e.g., instructors, CFP® practitioners, professional colleagues, etc.)

I certify that all of the information provided in support of this application is complete and accurate.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Submission:** Mail or email completed and signed application with all attachments to one of the following local chapters:

***FPA of San Francisco:***

FPA of San Francisco Scholarship Applications c/o Karen Blodgett  
Aspiriant  
50 California Street, Suite 2600  
San Francisco, CA 94111  
kblodgett@aspiriant.com

***FPA East Bay:***

FPA East Bay Scholarship Applications  
P.O. Box 948  
Clayton, CA 94517  
EastBayFPA@gmail.com

***Applications must be postmarked by January 14, 2019***