



**FINANCIAL
PLANNING
ASSOCIATION**
EAST BAY



**FINANCIAL
PLANNING
ASSOCIATION**
SAN FRANCISCO

2020 SCHOLARSHIP APPLICATION

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

Choose only one: CFP® Certificant Scholarship FPA Residency Scholarship

FPA of the East Bay and FPA San Francisco each offer scholarship(s) of \$1000 up to \$2000 to qualified financial planning students annually. Applications are due by November 30, 2020.

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

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 East Bay:

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

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

Applications must be postmarked by November 30, 2020