



2021 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: fpasf.org and fpaeb.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, 2021.

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, 2021