



THE FINANCIAL PLANNING ASSOCIATION

The CFP® Scholarship Application **FPA of South Carolina**

The primary aim of the Financial Planning Association™ (FPA™) is to be the community that fosters the value of financial planning and advances the financial planning profession. FPA's strategy to accomplish its objectives involves welcoming all those who advance the financial planning process and promoting the CFP® mark as the cornerstone of the financial planning profession.

Application Instructions for Merit Based Scholarship

Eligibility

To be eligible for a \$500 tuition scholarship, an applicant must meet all of the following qualifications:

- Currently enrolled in a CFP® program administered by an accredited university or college registered with the CFP Board of Standards.
- Have the intention to become a CFP® certificant by fulfilling all requirements (currently six courses) and sitting for the CFP Board of Standards comprehensive certification examination.
- Must demonstrate academic and/or professional accomplishment, *e.g.*, GPA, degrees received, and/or specific professional achievements.
- Must be a member (or student member) of the Financial Planning Association™ of South Carolina and willing to attend an award ceremony.
If applicant is not a current FPA member, a membership application may be obtained by contacting FPA at 803-540-7522 or visiting fpasouthcarolina.org.

Submission

Applications must be received by:

August 2

Financial Planning Association of South Carolina

1215 Anthony Avenue

Columbia, SC 29201

Phone 803-540-7522

Fax 803-254-3773

Email garry.queen@fpasouthcarolina.org

Award

The decision to award this scholarship shall be made in the full discretion of the FPA of South Carolina Chapter Board of Directors or other body duly appointed by the Board of Directors.

Scholarship Application

Name _____ SS# _____ - _____ - _____

Address _____

City _____ State _____ Zip Code _____

Office Phone _____ Home Phone _____

E-mail _____

Name of Institution _____

The curriculum of the institution must be registered and approved by the CFP Board of Standards. Scholarship will be made payable to the institution.

CFP Course Work To Date (Use extra sheet if necessary)

Please list CFP courses you have taken to date:	

Future CFP Course Work Planned

Please list CFP courses you plan to register for in the Future		
Fall	Spring	Summer

Review Course and Exam

Do you plan to take a CFP review course?
_____ Yes (Date _____) _____ No

When do you intend to sit for the CFP Board of Standards certificate examination?

Month _____ Year _____

Academic Background

Institution	Year(s)	Degree(s) or Certificate(s)	GPA

Current and Previous Employment

Please list current and previous employment for the past ten years.

Employer	Employment Dates	Address (Street/City/State)	Position/Responsibilities

Professional / Civic Achievements

Please list any professional / civic achievements.

Type of Award/Honor	Name of Organization	Year

Please use the space provided in answering the following questions:

What do you feel are the benefits of obtaining the CFP designation?

Why have you chosen the financial planning profession?

What are your career goals after receiving the CFP designation?

Please use the space below to share any comments that you wish to be considered in your application:

Signature/Date
