

2009 Scholarship Program

Guidelines

Overview

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® certification marks as the cornerstone of the financial planning profession.

The FPA-GA Career Development Committee has developed the following guidelines in establishing our Merit-Based Scholarship Program for qualified CFP® candidates across the state of Georgia. Recognizing the value this adds to one's professional development, we encourage financial planning students to immediately pursue and obtain the CFP® designation.

CFP® Exam Fee Scholarship

One \$600 award will be given for 2009.

The winner will receive a \$600 merit-based CFP® certification examination reimbursement scholarship. All awards will be paid in arrears once all criteria have been met including passing the exam. No partial awards will be granted. The decisions to award these scholarships shall be made at the full discretion of the Board of the FPA of Georgia. All applicants are responsible for reading, understanding and abiding by all of the guidelines.



Eligibility

To be eligible for any scholarship award, **all** of the following qualifications must be met:

1. Currently enrolled in or recently graduated from a financial planning degree or certificate curriculum administered by an accredited university/program (registered with the CFP Board) in the state of Georgia. The "target audience" includes candidates who have graduated, or expect to graduate, between December 2009 and April 2010. (*Note: If you expect to graduate in April 2010 or later, we suggest you apply next year in order to give yourself the maximum time frame in which to pass the exam after having completed all your related coursework.*) To verify a program is registered, visit the CFP Board web site: <http://www.cfp-board.org/>.
2. Intention to take fulfill all requirements to become a CFP® licensee.
3. Complete and submit a timely and complete application package. The application package includes:

- Application form demonstrating academic and personal accomplishments (i.e. grades and degrees received as well as professional and community involvement, ambitions, etc.).
 - Proof of academic record such as an original transcript (or equivalent) from your institution.
 - Two letters of recommendation from either professors or CFP® professionals in good standing. We prefer to have these letters on original letterhead, accompanying your application and transcript; however, e-mail format is acceptable as long as the Selection Committee can reasonably confirm its validity (e.g. include author's phone contact information).
4. For the *CFP® Exam Fee Scholarships (Type 1)*: Pass the CFP® certification examination anytime before December 31 of the year following the year of award and submit proof to the FPA-GA Career Development Committee (e.g. 2009 award recipients must pass before Dec. 31, 2010, to receive their scholarship payment).
5. Be a current member of FPA-GA Chapter

Submission

1. Complete application packages must be postmarked on or before:

Thursday, October 1, 2009

2. The Selection Committee is not obligated to consider partially completed application packages. Application documents postmarked, or emailed, after the deadline date above will be considered incomplete.

Send to:

Financial Planning Association
248 Creekstone Ridge
Woodstock, GA 30188
Email: admin@fpaga.org

NOTE: These are all merit-based scholarships. Financial need is not a consideration. Limit one scholarship per individual. Recipients will receive their due award upon fulfillment of stated requirements.

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.