

The Anthony F. Farma, CFP® Scholarship Application FPA of Massachusetts

The primary aim of the Financial Planning Association™ (FPA™) is to be a 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. (The scholarship may be used towards a review course.)
- 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.
- Furnish one letter of recommendation. (Consider professors, instructors, CFP® practitioners, colleagues, etc.)
- Must be a member (or student member) of the Financial Planning Association™ of Massachusetts 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 800.322.4237 or visiting fpama.org.
- Must not have received a FPA CFP® Certification merit-based scholarship within the previous 12 months.

Submission

Applications must be received by:

December 31- For Spring Notification
June 30- For Fall Notification

Award

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

Forward Application and Letter of Recommendation to

Financial Planning Association of Massachusetts
411 Waverley Oaks Road, Suite 331B
Waltham, MA 02452

Phone 781-899-3530
Fax 781-647-7222
Email admin@fpama.org

Scholarship Application

Name _____	SS# _____ - _____ - _____
Address _____	
City _____	State _____ Zip Code _____
Office Phone _____	
Home Phone _____	
E-mail _____	
Name of Institution _____	
<p><i>The curriculum of the institution must be registered and approved by the CFP Board of Standards. Scholarship will be made payable to the institution.</i></p>	

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

Please list CFP courses you have taken to date:	

Course Work Planned for Fall, Spring and Summer Semesters

Please list CFP courses you plan to register for in the Fall, Spring and Summer Semesters		
Fall	Spring	Summer

Current and Previous Employment

Please list current and previous employment for the past ten years, starting with the most recent.

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

Professional Achievements

Please list any professional achievements for the past ten years starting with the most recent.

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 _____