Diversity Scholarship Program

2013 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.

In this spirit, the FPA Diversity Committee established the Diversity Scholarship Program to assist with its mission to develop strategies to raise awareness and promote inclusiveness of diverse communities including but not limited to; age, race, ethnicity, gender and sexual orientation in the financial planning profession. In so doing, FPA strives to increase professional opportunities for the widest spectrum of people so that all may join and thrive in the financial planning profession.

The FPA Diversity Committee, in coordination with our funding partners, has developed the following guidelines in establishing our merit-based scholarship program to sponsor Diversity Scholarship award recipients to attend an FPA National Conference, collaborate with the FPA community and promote inclusivity and creativity within the financial planning profession.

The FPA Diversity Scholarship Program is available for the following FPA National Conferences:

- FPA Business Solutions 2013
- FPA Retreat 2013
- FPA Experience 2013

FPA Conference	Dates	Submission Deadline	Notification Deadline	Location
FPA Business Solutions	March 7-9	2/1/2013	2/8/2013	Chicago, IL
FPA Retreat	May 4-6	3/29/2013	4/5/2013	Palm Springs, CA
FPA Experience	Oct. 19-21	9/13/2013	9/20/2013	Orlando, FL

Frequently Asked Questions:

What do the conference scholarships include?

- Conference registration fee (up to $875)
- Conference accommodations at the conference site and conference meals (up to 4 days)
- Travel to and from the conference site (capped at $500)
- One year paid individual membership in the Financial Planning Association
- One year free subscription to the *Journal of Financial Planning*
- One year paid dues to an FPA chapter of the winner's choice
- One year paid local chapter monthly meeting fees.

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Who is eligible to apply for the conference scholarships?

- Financial services students and professionals willing to demonstrate and act upon an intense desire to affect the diversity of the financial planning profession, including but not limited to:

  (1) raising awareness of the profession in diverse communities
  (2) serving diverse communities with financial planning and/or
  (3) increasing professional opportunities for diverse communities within the financial planning profession.

What is expected of conference scholarship recipients?

- Attendance of conference sessions, exhibits and appropriate extracurricular programs
- Participation in local FPA chapter events during one year paid FPA membership
- Written testimonial regarding the scholarship program and the winner's experience after they've attended the conference.

Additional information:

- The decisions to award these scholarships shall be made at the full discretion of the FPA Diversity Committee Scholarship Subcommittee or other body duly appointed by the FPA Board of Directors
- All applicants are responsible for reading, understanding and abiding by all of the scholarship program guidelines

Submission

Complete application packages must include the following items:

- Diversity Scholarship Application
- Two letters of recommendation from either professors or financial services professionals on original letterhead or email format clearly listing author's name, position, company and contact phone information

Scholarship submissions must be complete (both letters of recommendation and application) and received at FPA by the submission deadline. Submissions received after the deadline, or still incomplete will not be forwarded to the Selection Subcommittee. Items postmarked on the submission deadline and not received on time will not be considered.

Send to:

Diversity ScholarshipProgram
Financial Planning Association
Attn: Christine Richardson
7535 E Hampden Ave #600
Denver, CO 80231
800.322.4237x7104
Email: christine.richardson@FPAnet.org/FPADiversity@FPAnet.org

NOTE: These are all merit-based scholarships. Financial need is not a consideration.

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2013 Application

Please answer all questions in this application, including listing "not applicable" where appropriate.

First Name:	Last Name:

CURRENT	PERMANENT (if different from Current)
Address, City, State & ZIP:	Address, City, State & ZIP:
Phone: (please list at least one) W _____ H _____ C _____	Phone: (please list at least one) W _____ H _____ C _____

Email Address:

Are you a current FPA member? _____yes _____no

I am applying to attend the (choose one):

____ **FPA Business Solutions 2013**

____ **FPA Retreat 2013**

____ **FPA Experience 2013**

How did you learn about this scholarship?: _____

Education (fill in all that apply)**:**

Degree(s) held (please state degree, emphasis, and college/university):

_____

CFP Board-Registered Program or other degree program in which you are currently enrolled:

_____

When were you granted use of the CFP® designation? (if applicable) Mo/Yr _____

When are you planning to take the CFP® Certification Examination? (if applicable)Mo/Yr _____

Financial services certification program(s) in which you are currently enrolled or graduated:

_____

Other type of designation(s)/certificate(s):

_____

Academic Background: Other than the answers provided above, have you earned any additional degrees?

Institution	Degree/Certificate/Major of Study	Year	GPA (4.0 Scale)

Current & Previous Employment: Please list your employment history for the past ten years, starting with the most recent.

Employer	Dates	Street/City/State	Position/Responsibilities

Professional Achievement: Please list any professional achievements for the past ten years, starting with the most recent.

Type of Award/Honor	Year	Name of Organization

Community Service: Please list any community service activities for the past ten years, describing the nature of your involvement.

Type of Community Service	Year	Nature of Involvement

Short Essay Section: Please answer the following questions in your own words.

1 Why have you chosen the financial planning profession?

2 What is your interest and/or experience with helping diverse populations as it relates to the financial planning profession?

3 In your opinion, how can FPA best serve to further enhance the diversity of the financial planning profession?

4. What do you specifically hope to accomplish by participating in the 2013 FPA Conference you would attend as a FPA Diversity Scholarship winner?

5. Do you have any additional comments we should consider with your application?

By my signature below, I agree that the information submitted herein is complete, truthful and accurate, to the best of my knowledge. I have read, understand and will comply with all Guidelines for this Scholarship Program. I further understand that FPA will not be liable for paying an awarded scholarship, in whole or in part, if I fail to fulfill my repsonsibilities for the program within the prescribed time frame.

The decision to award this scholarship shall be made in the full discretion of the FPA Diversity Committee or other body duly appointed by the FPA Board of Directors. Incomplete or late applications will not be considered.

Additionally, I do intend to become an involved member of FPA as I recognize the importance and value of actively contributing to the advancement of the profession. By applying for this scholarship, I understand that if I am selected that I will be asked to discuss my experience by providing a testimonial and feedback to the Committee.

Signature of Applicant:	**Date:**

**** Be sure to submit two letters of recommendation from professors and/or financial services professionals with the completed application.***

Submit your Application to: FPADiversity@FPAnet.org