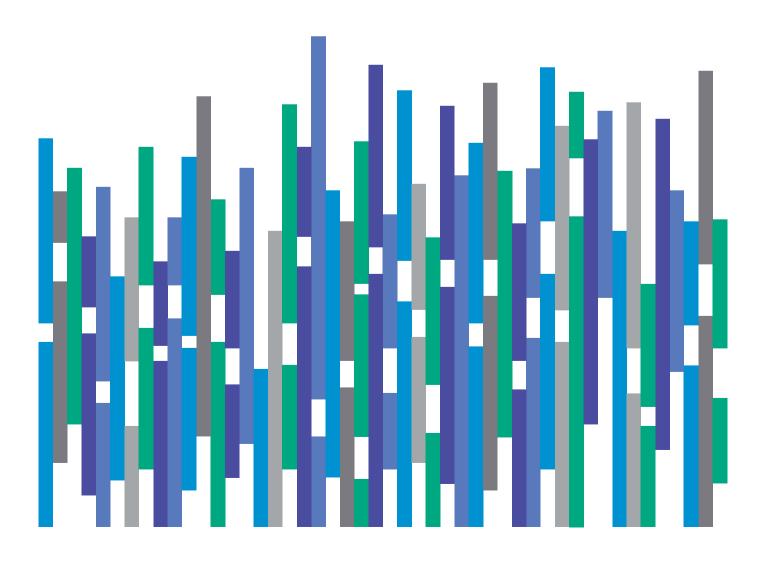


CFA PROGRAM STUDENT SCHOLARSHIPS

Student Guide



CFA PROGRAM STUDENT SCHOLARSHIPS

Student Guide



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CFA® Program Student Scholarship Overview

CFA Institute scholarships are part of our commitment to promoting the highest standards of ethics, education, and professional excellence. Our scholarships help make the CFA charter more attainable and give more people an opportunity to advance their career.

The University Affiliation Program consist of academic institutions that embed a significant portion of the CFA Program Candidate Body of Knowledge (CBOK)—including the Code of Ethics and Standards of Professional Conduct—into their curriculum.

An Affiliated University signals to their students and to employers that their curriculum is closely tied to the practice of investment management and is helpful to students preparing for the CFA[®] Program exams.

As a student enrolled at an Affiliated University you can apply for a CFA Program Student Scholarship. These scholarships are awarded by the Principal Contact (PC) at your university at their discretion. Some may have **additional qualifications and requirements** as part of a complete scholarship application. It is your responsibility to ensure you attach these before submitting your scholarship. In some cases, there may be more than one PC at an Affiliated University. If you are not sure who your university's PC is, please contact our Global Contact Center at **info@cfainstitute.org** or **by phone**.

Eligibility

To apply for a CFA Program Student Scholarship, you must:

- Not be currently registered for a CFA Program exam.
- Be enrolled at an affiliated university.
 - You are not required to be enrolled in the affiliated degree program to apply.
- Satisfy the enrollment requirements detailed here: https://www.cfainstitute.org/en/programs/cfa/charter.

Student Scholarship Award Information

When a decision has been made on your application submission you will be notified via email. There is no timeframe available for when your application will be reviewed. We encourage you to reach out to the PC at your university if you have any questions on the status of your application.

If you are selected for award...

The Student Scholarship waives the one-time program enrollment fee, and discounts the exam registration fee to \$350, which includes access to the curriculum and all available study tools. This discounted price (\$350) will be reflected during the checkout process.

We advise you to choose the exam offering that best accommodates your study routine and **register early** to ensure adequate time to prepare for the exam. Your award will be available for use three weeks from the date you receive your award decision email. Your award will expire one year from the date of this email. It is your responsibility to be aware of and abide by the **important exam dates** and **register** for the exam within the one-year time frame.

Once your award is available the discounted price of \$350 (plus any applicable local taxes) should display during the checkout process. Do not submit payment if that price is not reflected. Please contact our Global Contact Center at info@cfainstitute.org or by phone for further assistance.

If you are not selected for award...

We encourage you to continue to pursue your CFA Program goals and to support you in your efforts, we would like to offer you the early exam registration fee for your next exam registration. It will be available for use three weeks from the date of your award decision email. It is your responsibility to be aware of and abide by the **important exam dates** and **register** for the exam within the one-year time frame.

Once your exam registration discount is available you should see it reflected during the checkout process. Do not submit payment if early exam registration price is not reflected. Please contact our Global Contact Center at info@cfainstitute.org or by phone for further assistance.

How to apply for the CFA Program Student Scholarship

- Access the CFA Program Student Scholarship page here: https://www.cfainstitute.org/en/programs/cfa/scholarships/student and review the details of the program before continuing.
- 2. Follow the link to access the CFA Program Student Scholarship application or click here: https://CFAI.smapply.io/prog/cfa_program_student_scholarship.
- 3. Click the 'Log-in' text to log into your CFA Institute account.

CFA Institute CFA Institute	Log-in
CFA® Program Student Scholarship The Student Scholarship award waives the one-time program enrollment fee, and discounts the exam registration fee to \$350, which includes access to the curriculum and all available study tools. The Student Scholarship is available to any student enrolled at a school or college participating in the University Affiliation Program.	APPLY
Powered BY Apply	Copyright © SurveyMonkey Privacy Terms v6.4.29

4. Log in with your CFA Institute username and password.

CFA Institute	Represented locally through its global network of member societies
Log In	
New to CFA Institute? Create an A	ccount
Email	
Password	
Password	
	Need help logging in? Log In

5. Click the green 'View programs' button to see the available scholarship programs.

CFA Institute		🐥 Programs	A My Applications	• •	Gregg Allman 👻
	No applications.				
	Please choose a program from our program listings page to get started				
	View programs				
	POWERED BY Apply				

6. Click the green 'More' button

CFA Institute		🐥 Programs 🆙 My Applications 🛛 👻 Gregg Allman 👻
	CFA II	nstitute
Progra	ams	Search programs Q
The C make	EAS Scholarship FA Institute Access Scholarship Program is designed to CFAP Program more available to individuals who may not be o afford the full program fees.	CFA® Program Student Scholarship The CFA® Program Student Scholarship is available to any student currently enrolled at a school or college participating in the University Affiliation Program.
POWERED BY	Apply	Copyright @ SurveyHonkey Privzcy Terms V6.4.29

7. Click the green 'Apply' button.

CFA Institute	Log-in
CFA Institute	
CFA® Program Student Scholarship The Student Scholarship award waives the one-time program enrollment fee, and discounts the exam registration fee to \$350, which includes access to the curriculum and all available study tools. The Student Scholarship is available to any student enrolled at a school or college participating in the University Affiliation Program.	
ROWERED BY Apply Copyright © SurveyMonkey Pr	ivacy Terms v6.4.29

8. Click on 'CFA Program Student Scholarship' to access the application.

CFA Institute		🐥 Programs	A My Applications	• •	Gregg Allman 👻
0 of 1 tasks complete Last edited: Aug 28 2020 09:26 PM (EDT) REVIEW SUBMIT	CFA® Program Student Scholars	Preview ····			
POWERED BY 🏠 Apply	Copyright ⊕ SurveyHonk	key Privacy Terms v6.	4.29		

9. Each page of the application must be completed in full before proceeding to the next page.

Applicant Acknowledgement Page

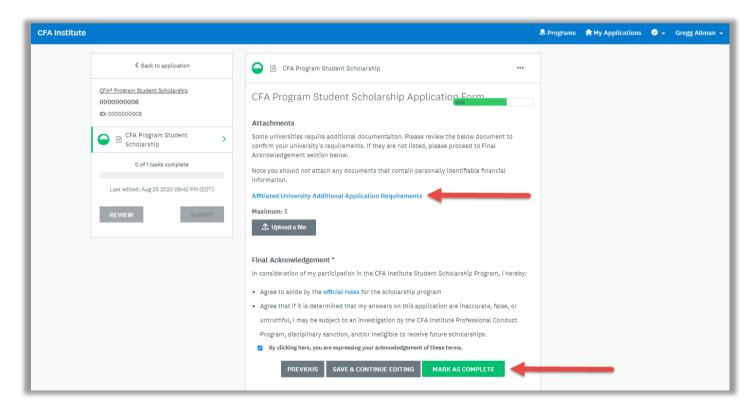
FA Institute		🐥 Programs 🏦 My Applications 🕕 👻 Gregg Allma
	K Back to application	CFA Program Student Scholarship
[CEA® Program Student Scholarship 0000000008 ID: 000000008 CFA Program Student Scholarship 0 of 1 tasks complete Last edited: Aug 28 2020 09:26 PM (EDT) REVIEW SUBMIT	CFA Program Student Scholarship Application
		accepted. By clicking here, you are expressing your acknowledgement of this policy. SAVE & CONTINUE EDITING NEXT
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Applicant Information Page

CFA Institute		🐥 Programs	Applications	0 -	Gregg Allman 👻
Back to application	G 🖻 CFA Program Student Scholarship				•
CFA® Program Student Scholarship 0000000008 ID: 000000008	CFA Program Student Scholarship Application Form * Draft saved @				
CFA Program Student > Scholarship	Select University This scholarship is available to students of a university participating in our University Affiliation				
0 of 1 tasks complete Last edited: Aug 28 2020 09:29 PM (EDT)	Program. Student Scholarships are evaluated by the Principal Contact at your university. Please select the Affiliated University you are currently enrolled at: *				
REVIEW SUBMIT	Q present of material present				
	Please enter the degree program you are currently pursuing (examples: Bachelor of				
	Science in Finance, Master of Business Administration, etc.) *				
	Applicant Information				
	First (Given) Name Last Name (Surname or Family Name)				
	Email Address Gender *				
	PREVIOUS SAVE & CONTINUE EDITING NEXT			_	-

Additional Application Requirements & Final Acknowledgement Page

• Some universities require additional documentation as part of a complete scholarship application. Access the CFA Program Student Scholarships Additional Requirements list. If your university is not listed, continue to the Final Acknowledgement section.



10. Click the 'Mark as Complete' button. You will then be taken to the Review page where you are able to review each of your responses. Ensure the application is complete and you are satisfied with your responses. Once you submit your application, you are no longer able to edit your responses.

CFA Institute			🐥 Programs	Applications	0 -	Gregg Allman 👻
	K Back to application	CFA Program Student Scholarship				
CFA® Program 0000000000 ID: 000000000		CFA Program Student Scholarship Application Form Acknowledgement Applicant Acknowledgement				
Sch	1 of 1 tasks complete	We are excited that you have chosen to pursue the CFA Program designation. As an applicant for the Student Schlarship, you certify that you are a full-time undergraduate student in your final year of study or a full or part- time araduate student and that you meet the entrance requirements for the CFA Program.				
	d: Aug 28 2020 09:49 PM (EDT)	time groundle suderin and time you meet use entrance requirements for the Criter organit. Important Note: Applicants should not register for any examination prior to receiving an official scholarship decision. Please be aware that your application will be declined if you register for a CFA Program exam prior to a decision being made on your scholarship application.				
REVIEW	SUBMIT	If you have already registered for an upcoming exam, your scholarship application will not be accepted. Responses Selected:				
		By clicking here, you are expressing your acknowledgement of this policy. <u>Applicant Information</u> "indicates a required field				
		Select University				

11. If you need to change any of your responses, click on the '...' and select 'Edit.'

FA Institute			🐥 Programs	Applications	0 -	Gregg Allman 🚽
	K Back to application	CFA Program Student Scholarship Completed Aug 28 2020 08:49 PM (EDT)				
	CFA® Program Student Scholarship	CFA Program Student Scholarship Application Form				
	000000008 ID: 000000008	Acknowledgement				
	CFA Program Student	Applicant Acknowledgement				
	Scholarship	We are excited that you have chosen to pursue the CFA Program designation. As an applicant for the Student				
	1 of 1 tasks complete	Scholarship, you certify that you are a full-time undergraduate student in your final year of study or a full or part- time graduate student and that you meet the entrance requirements for the CFA Program.				
	Last edited: Aug 28 2020 09:49 PM (EDT)	Important Note: Applicants should not register for any examination prior to receiving an official scholarship decision. Please be aware that your application will be declined if you register for a CFA Program exam prior to a decision being made on your scholarship application.				
	REVIEW SUBMIT	If you have already registered for an upcoming exam, your scholarship application will not be accepted.				
		Responses Selected:				
		By clicking here, you are expressing your acknowledgement of this policy.				

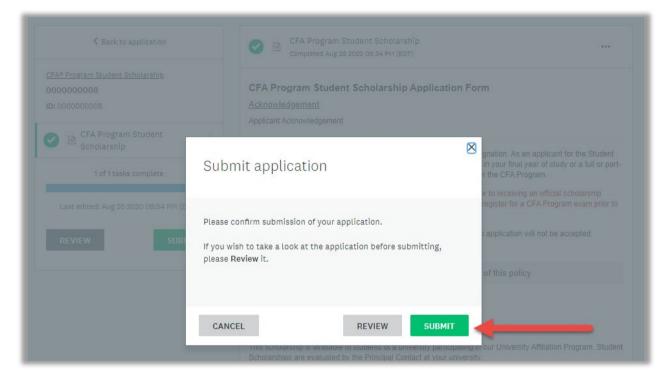
12. Your application will be opened, and you may navigate through each page to make any needed changes. Once you have made the necessary changes click the green 'Mark as Complete' button.

CFA Institute			🐥 Programs	Applications	• •	Gregg Allman 🔫
	< Back to application	🕒 🖻 CFA Program Student Scholarship 🚥				
	<u>CFA® Program Student Scholarshio</u> 0000000008 ID: 000000008	CFA Program Student Scholarship Application				
	← CFA Program Student >	Some universities require additional documentaiton. Please review the below document to confirm your university's requirements. If they are not listed, please proceed to Final				
	0 of 1 tasks complete	Acknowledgement section below. Note you should not attach any documents that contain personally identifiable financial information.				
	Last edited: Aug 28 2020 09:42 PM (EDT)	Affiliated University Additional Application Requirements				
	REVIEW SUBMIT	Maximum: 5 企 Upload a file				
		 Final Acknowledgement * In consideration of my participation in the CFA institute Student Scholarship Program, I hereby: Agree to abide by the official rules for the scholarship program Agree that if it is determined that my answers on this application are inaccurate, false, or untruthul, I may be subject to an investigation by the CFA institute Professional Conduct Program, disciplinary sanction, and/or ineligible to receive future scholarships. By clicking here, you are expressing your acknowledgement of these terms. 				

13. When you are ready to submit your application for review, click the green 'Submit' button.

Institute				🐥 Programs	A My Applications	0 -	Gregg Allman
	Back to application		CFA Program Student Scholarship				
CFA® Program. 0000000000 ID: 000000000			CFA Program Student Scholarship Application Form Acknowledgement Applicant Acknowledgement				
Schu	Program Student	>	We are excited that you have chosen to pursue the CFA Program designation. As an applicant for the Student Scholarship, you cartify that you are a full-time undergraduate student in your final year of study or a full or part-				
	of 1 tasks complete I: Aug 28 2020 09:54 PM (EDT)		time graduate student and that you meet the entrance requirements for the CFA Program. Important Note: Applicants should not register for any examination prior to receiving an official scholarship decision. Please be aware that your application will be declined if you register for a CFA Program exam prior to a decision being made on your scholarship application.				
REVIEW	SUBMIT	4	If you have already renistared for an uncoming exam, your scholarship application will not be accepted.				
			By clicking here, you are expressing your acknowledgement of this policy.				

14. You must confirm your submission once more by clicking the green 'Submit' button.



15. You can then navigate back to your application or to the scholarship program overview page. You application has been submitted.

CFA Institute		🐥 Programs	A My Applications	• -	Gregg Allman 👻
	•				
	Application Submitted!				
	Go to My Applications				
	OR View more Programs				
	view more Programs				

Other Navigation

My Applications

This page allows you to view any page you can see your submitted applications along with the exact date and time you made your submission. Note that you will not see or receive any status updates on your application until the award decision is made by the PC from your university.

CFA Institute			🐥 Program	A My Applications	regg Allman 👻
	All Applications 🗸		: =	1	
	••• CFA® Program Student Scholarship 000000008				
	VIEW Submitted on: Aug 28 2020 09:56 PM (EDT)				
		1 - 1 of 1 Applications			
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Programs Page

This page contains the complete portfolio of available CFA Program and CIPM[®] Program scholarships. Click on the green 'More >' button to learn more.

CFA Institute	Regrams y Applications 🔍 - Gregg Allman -
CFA	Institute
Programs	Search programs Q # =
Access Scholarship The CFA Institute Access Scholarship Program is designed to make CFA® Program more available to individuals who may not be able to afford the full program fees.	CFA® Program Student Scholarship The CFA® Program Student Scholarship is available to any student currently enrolled at a school or college participating in the University Affiliation Program.
MORE >	See my application MORE >
FOWERED BY 🏠 Apply:	Copyright © SurveyMonkey Privacy Terms v6.4.29

Frequently Asked Questions

What if I am having trouble logging in to my CFA Institute account?
I want to sit for a specific exam, when should I apply?
How will I know if my application was submitted successfully?
Can I edit my application after I submit it?
What is the status of my application?
I have completed my exam registration; can I apply for a scholarship?
I submitted a scholarship application; can I register and then receive a refund if I am selected for award?
Who do I contact if I have a question that isn't answered here?

What if I am having trouble logging in to my CFA Institute account?

Please ensure you are using Google Chrome browser when submitting your CFA Program Student Scholarship. You may need to use an 'Incognito' window if you experience any difficulties. If using an incognito browser does not resolve the issue, please contact the Global Scholarships Administration at scholarships@cfainstitute.org.

If you are not able to log in to your CFA Institute account, please **contact our Global Contact Center** for assistance. We suggest you call rather than email for a quicker resolution.

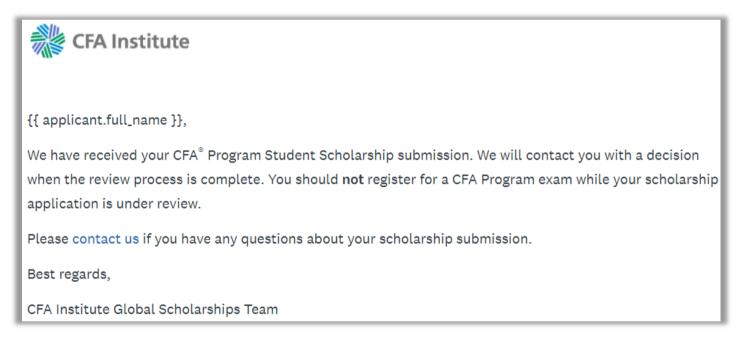
I want to sit for a specific exam, when should I apply?

While there are technically no deadlines to apply for a CFA Program Student Scholarship, you can use the below table as suggested guidance. It is important to note that once awarded your scholarship can be redeemed for up to one year from the date you receive your award notification email.

Exam	Exam Registration Deadline	Application Submitted
Feb 2021	7 December 2020	before 6 November 2020
May 2021	23 February 2021	before 24 January 2021
August 2021	4 May 2021	before 2 April 2021
November 2021	10 August 2021	before 9 July 2021

How will I know if my application was submitted successfully?

Upon submission of your application you should receive the below email. If not, please email **scholarships@cfainstitute.org**.



What if I no longer want to be considered for a CFA Program Student Scholarship?

Please email **scholarships@cfainstitute.org** to request your application be withdrawn. Note that this will remove your application completely. You are always welcome to apply for a scholarship again in the future as long as you are not registered for a CFA Program exam.

Can I edit my application after I submit it?

Once you have submitted your application you are no longer able to make edits. However, if you need to update your application please email scholarships@cfainstitute.org and your application to be 'reopened.' Once you receive email confirmation that your application is open, return to your 'My Applications' page at https://cfai.smapply.io/prog/.

CFA Institute			🐥 Program	A My Applications	regg Allman 👻
	All Applications •		: =	1	'
	 CFA® Program Student Scholarship 0000000008				
	SUBMITTED				
	VIEW Submitted on: Aug 28 2020 09:56 PM (EDT)				
		1 - 1 of 1 Applications			- 1
	РОМИЛИСЬ ВУ 🏠 Apply		onkey Privacy Terms v6.4.29		

Click on the green 'Continue' button to make any needed changes to your application.

CFA Institute				🐥 Programs	Applications	0 -	Gregg Allman 👻
	All Applications 🗸		=	=			
	••• CFA® Program Student Scholarship 000000008						
	1 of 1 tasks complete CONTINUE Last edited: Aug 28 2020 09:56 PM (EDT)						
		1 - 1 of 1 Applications					
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Click on the 'CFA Program Student Scholarship' link to access your application. Once you have made the needed changes, click on the green 'Submit' button.

CFA Institute			🐥 Programs	Applications	0 -	Gregg Allman
	Submitted Submitted on: Aug 28 2020 09:56 PM (EDT)	CFA® Program Student Scholars [2]				
		APPLICATION ACTIVITY				
		Your tasks				
		CFA Program Student Scholarship	>			
	A					
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istitute			🐥 Programs	A My Applications	0 -	Gregg Allman 👻
Back to application		CFA Program Student Scholarship				
<u>CFA® Program Student Scholarship</u> 000000008 ID: 000000008		CFA Program Student Scholarship Application Form <u>Acknowledgement</u> Applicant Acknowledgement				
CFA Program Student Scholarship	>	We are excited that you have chosen to pursue the CFA Program designation. As an applicant for the Student				
1 of 1 tasks complete		Scholarship, you certify that you are a full-time undergraduate student in your final year of study or a full or part- time graduate student and that you meet the entrance requirements for the CFA Program.				
Last edited: Aug 28 2020 09:54 PM	EDT)	Important Note: Applicants should not register for any examination prior to receiving an official scholarship decision. Please be aware that your application will be declined if you register for a CFA Program exam prior to a decision being made on your scholarship application.				
REVIEW	міт	If you have already registered for an uncoming exam, your scholarship application will not be accepted.				
		Responses Selected: By clicking here, you are expressing your acknowledgement of this policy.				

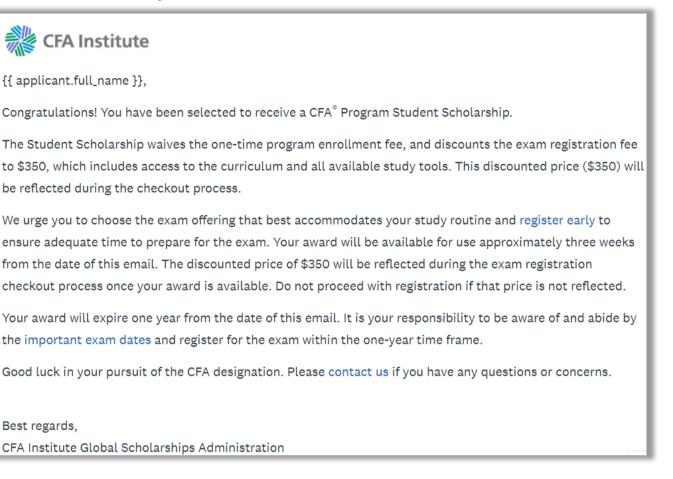
Click the green 'Submit' button to submit your CFA Program Student Scholarship application.

< Back to application	CFA Program Student Scholarship
	CFA Program Student Scholarship Application Form Acknowledgement Applicant Acknowledgement
	Submit application
	Please confirm submission of your application. If you wish to take a look at the application before submitting, please Review it. of this policy.
	CANCEL REVIEW SUBMIT

What is the status of my application?

There are no status updates available once you submit your application. Once a decision is made on your application you will be notified immediately via email.

If you are selected for award you will receive the below email



If you are not selected for award you will receive the below email

CFA Institute

{{ applicant.full_name }},

Thank you for your CFA[®] Program Student Scholarship submission. Unfortunately, your scholarship application was not selected for award.

We encourage you to continue to pursue your CFA Program goals and to support you in your efforts, we would like to offer you the early exam registration fee discount for your next exam registration. Your pricing discount will be available to redeem for up to one year from the date of this email. Please refer to the exam fees and important dates webpages for detailed information.

Good luck in your pursuit of the CFA designation. Please contact us if you have any questions or concerns.

Best regards, CFA Institute Global Scholarships Administration

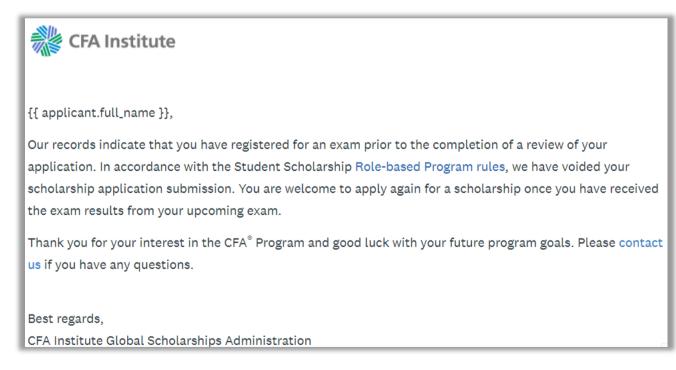
I have completed my exam registration; can I apply for a scholarship?

No, you are not eligible to apply for or receive a CFA Program scholarship if you are registered for a CFA Program exam. Once you receive your exam results you are welcome to apply for a scholarship for a subsequent exam registration.

If a you are registered and attempt to submit a CFA Program scholarship your application will be denied, and you will receive the below message.



I submitted a scholarship application; can I register and then receive a refund if I am selected for award? No, if you register for a CFA Program exam before receiving your award decision email, your application will be voided upon review by the PC at your university. You will receive the email below if this occurs. You are welcome to apply again once your exam results from your exam are made available.



Who do I contact if I have a question that isn't answered here?

For questions regarding the CFA Program Student Scholarship please contact our Global Contact Center at **info@cfainstitute.org** or **by phone** for immediate assistance.