



## **Richard B. Wagner Memorial Scholarship 2020 FPA Residency**

### **Purpose**

To honor the legacy of Richard B. (Dick) Wagner by supporting the diverse and appropriate expansion of the next generation of financial planners through scholarships to aspiring professionals who are committed to the CFP® designation and the practice of financial planning.

### **Focus**

The focus of the fund is to offer scholarships to FPA members seeking to further their professional development and positively impact the profession of financial planning.

### **Scholarship Criteria**

Scholarships will be available annually. Applicants will be evaluated based on criteria developed by FPA Residency Deans.

### **Scholarship Award**

This scholarship is a grant to support attendance to FPA's Residency programs to be held at the Hyatt Regency, Aurora-Denver Conference Center. **The dates for 2020 are June 12<sup>th</sup> to the 17<sup>th</sup> and October 23<sup>rd</sup> to the 28<sup>th</sup>.** The scholarship winners (one will be awarded for each program) will receive a full-ride award covering the cost of tuition, housing, and meals (\$3500) and subsidized travel (up to \$500).

The **FPA Residency** program is a unique, highly acclaimed, intensive, week-long, experiential-learning program designed to immerse newly or soon-to-be certified CFP® professionals in practicing the "art of financial planning." Led by a faculty of highly experienced and nationally known deans and mentors, program participants or residents spend their days role-playing and working through real-life financial planning scenarios. To learn more about the Residency program, go to: [www.onefpa.org/.../residency/pages/default.aspx](http://www.onefpa.org/.../residency/pages/default.aspx)

The FPA Residency program is for:

- Anyone who has completed the required CFP Board-registered program and is eligible to sit for the CFP Certification Examination.
- Anyone who is a CFP professional and has held the designation for three years or less.
- Anyone who is a CFP professional and is either:
  - Not practicing financial planning for a period of time;
  - Not doing client facing financial planning;
  - Or wants more training doing the comprehensive, client-centered approach to financial planning.

**Eligibility:**

- Applicants must be a first-time attendee to the event.
- Applicants must be paying for the program themselves, and not being reimbursed by an employer or other organization.
- Applicants must have a financial need.
- Applicants from an underrepresented population in the financial planning profession are strongly encouraged to apply as consideration will be given to gender, race, ethnicity, sexual orientation, persons with disabilities and persons from diverse economic backgrounds.

**Scholarship Application Requirements**

- Applicants must respond to the following short essay questions:
  - o Why have you chosen the financial planning profession as your vocation and what has prepared you to be successful in the financial planning profession? (500-1,000 words)
  - o Why do you want to attend the Residency program and what do you specifically hope to gain by participating in the FPA Residency program? (500-1,000 words)
  - o How does your background relate to the financial need and underrepresented population requirements of this scholarship? (500-1,000 words)
  - o In a short paragraph, please tell us about your current employer. In your response, provide name of current employer and the ways they are supporting your continuing education in financial planning. (If applicable, indicate if financial support for the education was provided). **Note:** if you are not currently employed you can leave this blank and your application will not in any way be impacted.
- Scholarship recipients will be required to write about their experience after attending the event to improve the experience for future scholarship recipients and future Residency attendees.

**Application Review Process**

The review and awarding of scholarships will be conducted by the FPA Residency Deans.

**Application Deadline for June 2020 program:** April 1, 2020

Notification: April 15, 2020

**Application Deadline for October 2020 program:** July 7, 2020

Notification: To be determined

**Application Submission**

Please send completed applications and/or questions to:

Awards@OneFPA.org