



Richard B. Wagner Memorial Scholarship FPA NexGen Gathering

Purpose

To support the diverse and appropriate expansion of the next generation of financial planners by offering 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 NexGen leaders.

Scholarship Award

The Scholarship award is for expenses associated with attendance to Gathering, which will cover the registration fee for FPA NexGen Gathering \$125.

Eligibility

- Applicants must be a first-time attendee to the event
- Applicants must have a financial need
- Applicants must be from an underrepresented population in the financial planning profession
 - gender, race, ethnicity, sexual orientation and/or persons with disabilities¹

Scholarship Application Requirements

- Applicants must respond to four short essay questions:
 - Why have you chosen the financial planning profession as your vocation? (500-1,000 words)
 - What do you specifically hope to gain by participating in the FPA Gathering program? (500-1,000 words)

¹ We define disability as described under the Americans with Disabilities Act: “A physical or mental impairment that substantially limits one or more major life activities of such an individual. A record of such an impairment or being regarded as having such an impairment”.

- What has prepared you to be successful in the financial planning profession? (500-1,000 words)
- Describe your background and how it relates to this scholarship. (Review eligibility criteria) Is there anything else we should know about you? (500-1,000 words)
- Letter of recommendation.
- Scholarship recipients will be requested to write about their experience after attending the event so we may further understand what worked well and how to improve our processes for Gathering scholarship recipients and attendees in the future.

Application Review Process

The review and awarding of scholarships will be conducted by the FPA NexGen Scholarship Committee.

Application Deadline

June 25th, 2021

Application Submission

Please send completed applications and/or questions to:
fpanexgen@onefpa.org