

Diversity, Equity & Inclusion Scholarship Application - FPA Annual Conference 2023

SUBMISSION DEADLINE: April 21, 2023, Midnight MT

Financial Planning Association® (FPA®) is 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, Equity & Inclusion Committee established the Diversity Scholarship Program to assist with its mission to develop strategies to raise awareness and promote inclusiveness of diverse communities. 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 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.

Frequently Asked Questions:

What do the conference scholarships include?

- **Conference registration fee**
- **One year paid individual membership in the Financial Planning Association**
- **One year free electronic 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.**

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.**
- 4.**

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 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.

Email: FPADiversity@OneFPA.org

1. Will you be completing the online application or posting the completed document and supporting items?

- Using Online Application
- Submitting the Completed Applications via this Survey

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2. Name:

3. Address (Please provide the address you prefer to receive FPA communications from. Should you be chosen, this is where your expense reimbursements, if applicable, are sent.)

4. Contact Information: (please list at least one phone # and email)

Work

Home

Cellular

Email Address (Note, this is the address FPA will use to contact you regarding the scholarship and other FPA communications)

Secondary Email Address (if applicable)

Additional Contact Information

5. Are you a current FPA member?

Yes

No

6. How did you learn about this scholarship?

Through a colleague/FPA member/FPA leader

Through an FPA communication (newsletter, etc.)

Through FPA social media

Through my chapter

Other (please specify)

7. Please share your degrees, emphasis, and college/university:

| | |
|--------------------------------|----------------------|
| No College Experience | <input type="text"/> |
| Associate's | <input type="text"/> |
| Bachelor's | <input type="text"/> |
| Master's or Above | <input type="text"/> |
| Certificate | <input type="text"/> |
| Current courses enrolled in | <input type="text"/> |
| Other | <input type="text"/> |

8. CFP Board Registered Program Information

Are you registered in a CFP Board Program?

Have you been registered in a CFP Board Program?

Do you intend to take the CFP Certification exam? If so, when?

If you've sat for the exam, what is the Month and Year you are/will be allowed to use the CFP designation?

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

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

Company Name, Title,
City and State, Dates
of Employment,
Duties:

Company Name, Title,
City and State, Dates
of Employment,
Duties:

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

Type of Award/Honor,
Name of Organization,
Year

Type of Award/Honor,
Name of Organization,
Year

Type of Award/Honor,
Name of Organization,
Year

Type of Award/Honor,
Name of Organization,
Year

Type of Award/Honor,
Name of Organization,
Year

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

13. Why have you chosen the financial planning profession?

14. What does diversity mean to you, and how does your personal view of diversity relate to the financial planning profession?

15. In your opinion, what role can FPA play in fostering a culture of diversity and inclusion in the financial planning profession?

16. What do you specifically hope to accomplish by participating in the FPA conference you would attend as an FPA Diversity Scholarship winner?

17. How do you plan to share and use the knowledge you learn from the conference in your community?

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

19. 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. (Provide electronic signature below)

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20. If uploading your application, please do so here. All others may skip this question.

Choose File

Choose File

No file chosen

21. Please upload Letter of Recommendation #1

Choose File

Choose File

No file chosen

22. Please upload Letter of Recommendation #2

Choose File

Choose File

No file chosen

23. By my electronic 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 responsibilities for the program within the prescribed time frame.

24. Date of Signatures and application submission