



## 2026 Scholarship Program

### ***Overview***

The mission of the Financial Planning Association of Dallas/Fort Worth is to foster excellence in the practice of financial planning and to promote the value of becoming a CFP® professional.

There are two types of merit-based awards available, and financial need is not a consideration. An applicant may be considered for both types of awards with one application. Scholarships are awarded to those who have not already secured alternate scholarships for the same expense.

The decision to award these scholarships will be made at the full discretion of the FPA-DFW Scholarship Program Selection Committee. All applicants are responsible for reading, understanding, and abiding by all of the guidelines.

Each recipient will be invited to attend the 2026 FPA DFW awards ceremony in Dallas in October. This is not a requisite, but we hope recipients are able to join.

### **Type 1: CFP® Exam Fee Scholarship**

This scholarship entitles the recipient to an \$825 merit-based CFP® Exam reimbursement. All awards will be paid in arrears once all criteria have been met including passing the exam. No partial awards will be granted.

### **Type 2: CFP® Exam Preparation Scholarship**

This scholarship entitles the recipient to up to \$1,400 toward the enrollment cost of a CFP® Exam Preparation review course. It is intended to reimburse the applicant only for the actual enrollment costs and the cost of study materials -- not travel, meals, calculators, or other expenses of attendance. All awards will be paid in arrears once all criteria have been met.

### **Scholarship Funds Available for Scholarship Awards**

***Dennis Carpenter, CFP® Merit Scholarship***

***Peggy Everson, CFP® Memorial Merit Scholarship***

***Pamela Yip Memorial Merit Scholarship***

***E.W. "Woody" Young, CFP® Memorial Merit Scholarship***

***SFMG Wealth Advisors Merit Scholarship in Honor of Barry Evans, CFP®***

## ***Eligibility***

To be eligible for any scholarship award, ***all*** of the following qualifications must be met:

1. Currently enrolled in, or graduated from, a financial planning degree or certificate curriculum administered by an accredited university/program (registered with the CFP Board). To verify that a program is registered, visit the [CFP Board web site](#). The candidate's graduation date must be after November 30<sup>th</sup> of the year prior and before August 31<sup>st</sup> of the current year to be considered (e.g. **2026 applicants must have a graduation date, or anticipated graduation date, after 11/30/2025 and before 08/31/2026 to be considered**).
2. Connection to DFW as defined by at least one of the following options:
  - a) Coursework completed at a CFP Board-Registered University / Program in Texas
  - b) Living in Dallas–Fort Worth metroplex and completing an online CFP Board-Registered Program

Dallas–Fort Worth metroplex includes the 13 North Texas Counties: Collin, Dallas, Denton, Ellis, Hood, Hunt, Johnson, Kaufman, Parker, Rockwall, Somervell, Tarrant and Wise.

3. Intention to take all required courses for the CFP Board's certification examination and fulfill all requirements to become a CFP® professional. Note that preference will be given to candidates who intend to practice in the field.
4. Complete and submit the application package (see details in Application Package).
5. For the CFP® Exam Fee Scholarship (Type 1): Pass the CFP® Exam any time between January 1<sup>st</sup> of the year of application and December 31<sup>st</sup> of the year following the year of award and submit proof to the FPA-DFW Scholarship Committee (e.g. **2026 award recipients must pass after January 1, 2026 and before December 31, 2027**, to receive their scholarship payment).
6. For the CFP® Exam Preparation Scholarship (Type 2): The award can be claimed only once **between January 1, 2026 and December 31, 2027**. To claim award, recipients must provide the prep course receipt. Passing the exam is not a requirement of this award.

## ***Application Package***

### **Items to submit to the Scholarship Committee:**

1. Completed application
2. Two letters of recommendation from professors or CFP® professionals in good standing
3. Original course grade transcript or equivalent

### **Please email the completed application package to:**

FPA-DFW Scholarship Committee  
Attn: Hannah Szarszewski, Chair  
scholarship@fpadfw.org

### **The application package must be emailed on or before: April 21, 2026.**

The Selection Committee is not obligated to consider partially completed application packages.  
Application documents received after the deadline date above will be considered incomplete.

*Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.*



**FINANCIAL  
PLANNING  
ASSOCIATION**  

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**DALLAS  
FORT WORTH**



**The  
Dallas  
Foundation**

# 2026 Scholarship Program Application

You may type or write *legibly* to complete this application, ***BUT PLEASE DON'T ALTER THE FORMAT.***

Please indicate the scholarship(s) for which you are applying. You may select just one or both. By applying for a scholarship, you are attesting that you have not already been awarded a scholarship for the same expense from another source. Available reimbursement by your employer does not count as a scholarship.

- ☐ **Type 1: CFP® Exam Fee Scholarship**
- ☐ **Type 2: CFP® Exam Preparation Scholarship**

First and Last Name: \_\_\_\_\_

Current Address (Street, City, State, and Zip): \_\_\_\_\_

Permanent Address (if different from current): \_\_\_\_\_

Preferred Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

CFP Program in which you are currently enrolled or graduated from:

\_\_\_\_\_

Expected graduation date: \_\_\_\_\_

If you plan to take a review course before the exam, which course is it?

\_\_\_\_\_

How do you fulfill the connection to DFW requirement?

\_\_\_\_\_

How do you intend to use the CFP® certification in your career?

\_\_Practice \_\_Teach \_\_Other

How did you hear about the Scholarship Program? Please check all that apply.

\_\_FPA DFW website

\_\_FPA DFW Career Day

\_\_Coworker/Friend

\_\_Professor

\_\_Other (Please describe): \_\_\_\_\_

<b>Academic Background:</b> Other than the answers provided above, have you earned any additional degrees?			
Institution	Degree or Certificate	Year	GPA

<b>Current &amp; Previous Employment:</b> Please list your employment history for the past five years.			
Employer	Dates	Street/City/State	Position/Responsibilities

<b>Professional Achievement:</b> Please list any professional achievements for the past five years.		
Type of Award/Honor	Year	Name of Organization

<b>Community Service:</b> Please list any community service activities for the past five years.		
Type of Community Service	Year	Nature of Involvement

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

1. **Why have you chosen the financial planning profession?**
  
  
  
  
  
  
  
  
  
  
2. **What do you feel are the benefits of becoming a CFP® professional?**
  
  
  
  
  
  
  
  
  
  
3. **What are your career goals beyond becoming a CFP® professional and how do you plan on achieving them?**
  
  
  
  
  
  
  
  
  
  
4. **Describe where you see yourself professionally five years from now.**
  
  
  
  
  
  
  
  
  
  
5. **If you were President of the Financial Planning Association, how would you guide the organization in its mission of advancing the financial planning profession?**

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-DFW will not be liable for paying an awarded scholarship, in whole or in part, if I fail to fulfill my responsibilities within the prescribed time frame. 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 my profession.

<b>Signature of Applicant:</b>	<b>Date:</b>
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