



Scholarship Program 2018

The Financial Planning Association of Wisconsin exists to promote the financial planning process and advance the financial planning profession. The Scholarship Program provides financial assistance to Individuals pursuing the Certified Financial Planner™ certification.

To qualify for this Scholarship, you must be;

- Current Wisconsin resident
- Enrolled in a CFP® Certification Program or registered for a CFP® Certification Review Class in preparation for the CFP® exam.

This \$200 Scholarship is awarded three times per year, one month prior to each of the CFP® Exam dates.

Application Deadlines & Important Dates:

<u>CFP® Exam Dates</u>	<u>Application Due to FPA</u>	<u>Winner will be notified</u>
March 20 – 27	February 15, 2018	March 2, 2018
July 10 – 17	June 7, 2018	June 22, 2018
Nov. 6 – 13	October 4, 2018	October 19, 2018

To be considered for the Scholarship, submit the following by one of the dates listed above;

- The completed application form (at the end of this document) with your signature.
- Proof of enrollment in a CFP® Certification class or Review Program
- Reference Form from a person who is not a relative. (See Reference Form at the end of this document)
Reference forms must be submitted directly to The FPA of Wisconsin by the person submitting the reference on behalf of the applicant.

Scholarship determinations are at the sole discretion of the FPA of Wisconsin’s Career Development Committee with approval of the Board of Directors. All scholarship decisions are final. Scholarship funds will be disbursed directly to the winner. Winners will be notified by letter and awards will be presented at a meeting of the FPA of Wisconsin.

Questions? Call Julie Coombs at 262-796-8400 or Brenda Matthias at 608-264-9001.

Email, mail or fax required materials by the Application deadline listed above to:

Scholarship Committee
 FPA of Wisconsin
 C/o Julie Coombs
 Storm Fischer Investment Group
 16655 W. Wisconsin Ave. Suite 105
 Brookfield, WI 53005
 Phone: 262-796-8400 Fax: 262-796-8410
 Julie@StormFischer.com



Application for Scholarship

Important Submission Dates:

February 15, 2018

June 7, 2018

October 4, 2018

Full Name _____

Address _____

City/State/Zip _____

Home Phone _____

Work Phone _____

Email _____

Employer _____

Position _____

Name of School or Company Enrolled in for CFP® Certification Program/Review Class (please include enrollment confirmation).

Scheduled / Anticipated CFP® Exam Date _____

Are you currently a member of the FPA of Wisconsin? _____

Would you like to hear about the benefits of joining your local chapter of FPA? _____

Why are you pursuing the CFP® Certification?

What are your career goals and your plans to pursue them?

List the name of one person who will provide a reference for you and their relationship to you (colleague, instructor, manager or FPA officer).

Name _____

Relationship _____

Phone _____

Applicant Signature

Date

Questions? Call Julie Coombs at 262-796-8400 or Brenda Matthias at 608-246-9001.



Reference Form

To Applicant: Provide this form to the person supplying a reference.

_____ is applying for a scholarship from the FPA of Wisconsin.

Please answer the following:

- 1. How long and in what capacity have you known the above individual?

- 2. Please describe what attributes this individual has to successfully pursue his/her education and career goals.

- 3. Please list your name, address, and phone number.

Please mail, email or fax your reference letter directly to the FPA of Wisconsin by the dates listed below. Do NOT return it to applicant. Thank you.

Due Dates:
February 15, 2018
June 7, 2018
October 4, 2018

Scholarship Committee
FPA of Wisconsin
C/o Julie Coombs
Storm Fischer Investment Group
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Brookfield, WI 53005
Phone: 262-796-8400 Fax: 262-796-8410
Julie@StormFischer.com