



FPA Oregon and SW Washington Chapter

2023 Scholarship Guidelines

Overview

The primary aim of the Financial Planning Association (FPA) is to be 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 and promoting the CFP® Certification marks as the cornerstone of the financial planning profession.

Each of the winners will receive a \$1,000 merit-based CFP® Certification Examination reimbursement scholarship. All awards will be paid in arrears once all criteria have been met, including passing the exam. No partial awards will be granted. We will reimburse you for up to \$1,000 of expenses relating to the CFP® exam. This may include study groups and study materials. The decisions to award these scholarships shall be made at the full discretion of the FPA Oregon and SW Washington Scholarship Program Selection Committee. All applicants are responsible for reading, understanding and abiding by all of the guidelines.

Eligibility

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

1. Currently enrolled in or recently graduated from a financial planning degree or certificate curriculum administered by an accredited university or program (registered with the CFP Board).
2. Pass the CFP® Certification Examination within one year of earning the scholarship and submit proof to the FPA-Oregon and SW Washington Scholarship Committee in a timely fashion.
3. Intention to fulfill all requirements to become a CFP® licensee.
4. Member of the Oregon and SW Washington chapter of the FPA OR a current undergraduate or graduate student.
5. Complete and submit a truthful and timely application package. The application package consists of the Scholarship Application form and two letters of recommendation.

Submission

The Selection Committee is not obligated to consider partially completed application packages. Complete the application and email to info@fpa-or.org. **Submission Deadline: October 31st, 2023**

Expectations After being Awarded the Scholarship

<p>Expectations of the recipient:</p> <ol style="list-style-type: none"> 1. Winners will be announced during our November 15th, 2023 CE Summit. Winners are expected to attend the event. 2. Pass the CFP exam between January 1st, 2023 and November 30th, 2024. 3. Submit proof of passing the CFP® exam and all receipts for reimbursement by December 31st, 2024. 	<p>Expectations of FPA of Oregon & SW Washington:</p> <ol style="list-style-type: none"> 1. As a recipient of our scholarship, you will also receive one year of free FPA membership as an Aspiring Financial Planner. Review the member benefits here: https://www.financialplanningassociation.org/membership/all-benefits 2. FPA of Oregon & SW Washington will mail the reimbursement scholarship check to the recipient's address in their application within two weeks of receiving proof of passing the CFP® exam and all accompanying receipts.
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