

The Anthony F. Farma, CFP® Scholarship Application FPA of Massachusetts

The primary aim of the Financial Planning Association™ (FPA™) is to be a 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® mark as the cornerstone of the financial planning profession.

Award

Recipient of the Anthony F. Farma, CFP® Scholarship will receive:

- a **\$500** tuition scholarship (payable to a CFP® education program/school)
- FPA National Membership Enrollment for 1 year
- FPAMA Local Membership Enrollment for 1 year
- FPA MA 3 meeting season pass \$60 value (includes February , September, and November, meetings for the upcoming year; does not include May Annual Meeting)

Application Instructions for Merit Based Scholarship

Eligibility

To be eligible an applicant must meet all of the following qualifications:

- Is currently enrolled in a CFP® program administered by an accredited university or college registered with the CFP Board of Standards. (The scholarship may be used towards a review course.)
- Have the intention of becoming a CFP® certificant by fulfilling all requirements (currently six courses) and sitting for the CFP Board of Standards comprehensive certification examination.
- Demonstrates academic and/or professional accomplishment (e.g., GPA, degrees received, and/or specific professional achievements).
- Provide one letter of recommendation. (Consider professors, instructors, CFP® practitioners, colleagues, etc.)
- Must be willing to attend an award ceremony.
- Must not have been awarded an FPA CFP® Certification merit-based scholarship within the previous 12 months.

Submission

Applications must be received by:

January 31, 2010 – Deadline for application

February 12, 2010 – Notification at FPA MA Meeting/Bentley University

Award

The decision to award this scholarship shall be made at the full discretion of the FPA of Massachusetts Chapter Board of Directors and/or other body duly appointed by the Board of Directors.

Forward Application and Letter of Recommendation to

Financial Planning Association of Massachusetts
PO Box 1255
Groton, MA 01450

Phone 978-597-2799

Fax 781-207-0248

Email admin@fpama.org

Submissions can be sent via email or fax.

Scholarship Application

Name _____ SS# _____ - _____ - _____
 Address _____
 City _____ State _____ Zip Code _____
 Office Phone _____
 Home Phone _____
 E-mail _____
 Name of Institution _____

The curriculum of the institution must be registered and approved by the CFP Board of Standards. Scholarship will be made payable to the institution.

CFP Course Work To Date
 (Use extra sheet if necessary)

Please list CFP courses you have taken to date:	

Course Work Planned for Fall, Spring and Summer Semesters

Please list CFP courses you plan to register for in the Fall, Spring and Summer Semesters		
Fall	Spring	Summer

Current and Previous Employment

Please list current and previous employment for the past ten years, starting with the most recent.

Employer	Employment Dates	Address (Street/City/State)	Position/Responsibilities

Professional Achievements

Please list any professional achievements for the past ten years starting with the most recent.

Type of Award/Honor	Name of Organization	Year

Please use the space provided in answering the following questions:

What do you feel are the benefits of obtaining the CFP designation?

Why have you chosen the financial planning profession?

What are your career goals after receiving the CFP designation?

Please use the space below to share any comments that you wish to be considered in your application:

Signature/Date _____