# UNIVERSITY AFFILIATION PROGRAM:
GUIDE TO CFA® PROGRAM STUDENT SCHOLARSHIPS FOR STUDENTS

How to apply for a student scholarship

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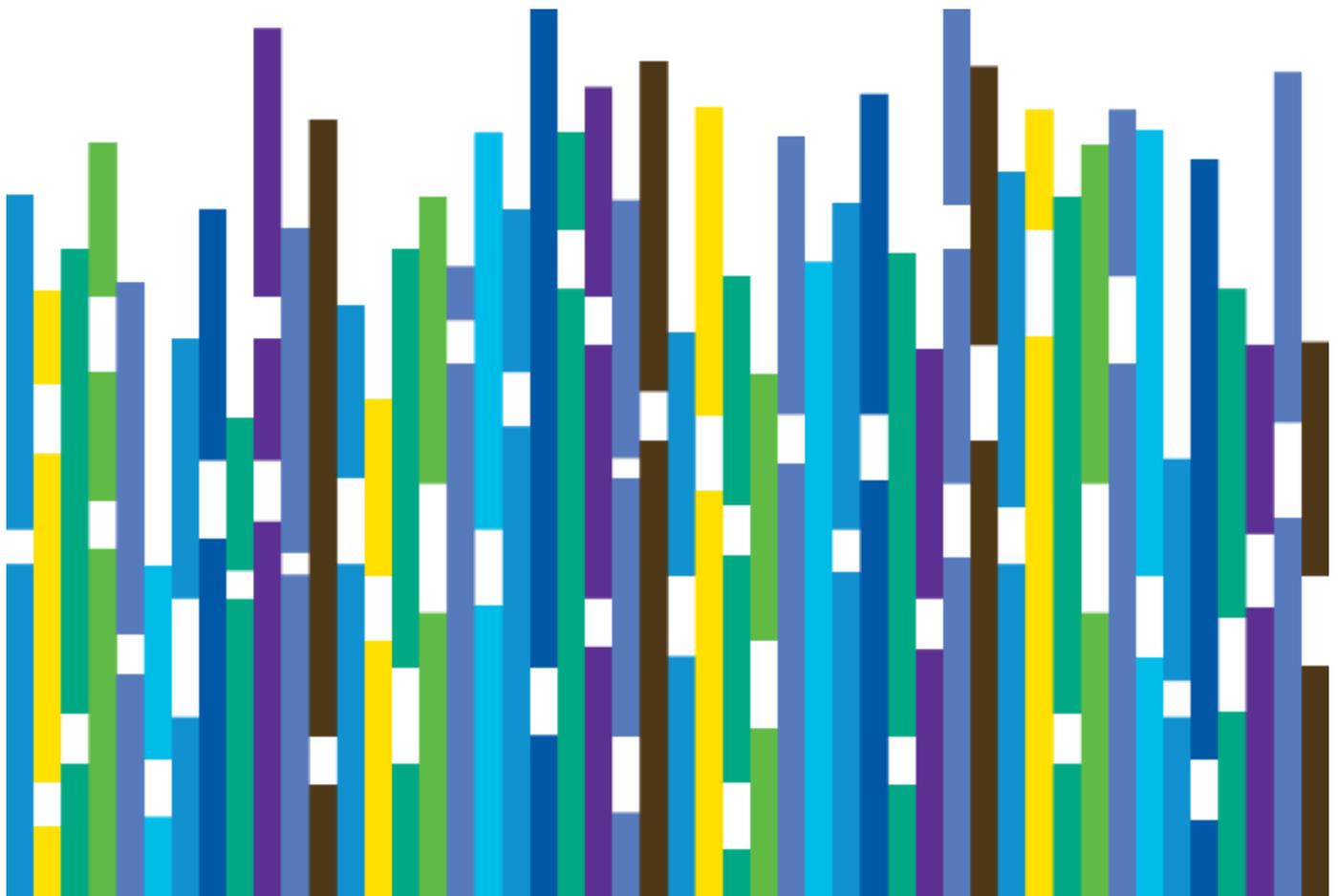
UNIVERSITY AFFILIATION PROGRAM:
STUDENT GUIDE TO CFA PROGRAM STUDENT SCHOLARSHIPS
Quick Reference Page

As a participant in the University Affiliation Program (UAP), your university is allotted a number of scholarships.

Students who receive UAP Scholarships pay US$350 for exam registration, including access to the eBook curriculum. The program enrollment fee is waived. Therefore, the three-tiered pricing available on our website does NOT apply to scholarship recipients.

Students should NOT register for the exam prior to applying for a scholarship. See below for explanation.

Students who applied but were not selected to receive a scholarship will receive the early registration price regardless of the time of their scholarship application submission. That is, if you submit a scholarship application at any time during the application window but are not selected to receive a scholarship, you will still receive the early registration price.

Accessing the Scholarship Applications:
PLEASE NOTE: All scholarship application selections are made online by the Principal Contact.

Student Scholarship Link (to submit an application):
https://www.cfainstitute.org/programs/cfa/scholarships/student
> *Note: there is no automatic notification sent to the PC when a scholarship application is submitted.

Scholarship application schedule

December 2019 Exam
24 Jan – Applications open
8 Aug – Student application submission deadline
15 Aug – Professor selection deadline
11 Sept – Final Registration deadline

June 2020 Exam
16 Aug – Applications open
1 Feb – Student application submission deadline
6 Feb – Professor selection deadline
13 March – Final Registration deadline

> Please note: This schedule is current as of March 2019, please verify application schedule here:
> https://www.cfainstitute.org/programs/cfa/exam/calendar

Who should I contact if I have questions?
Please email university@cfainstitute.org with any questions or concerns you may have.

Frequently Asked Questions for Students:
Who can apply for my university's scholarships?

Any student enrolled at an Affiliated university who meets the CFA Exam registration requirements is eligible and can apply for a scholarship, regardless of whether they are enrolled in the Affiliated degree program, or even the appropriate department or school. However, the Principal Contact has sole discretion in awarding scholarships.

Some universities require specific documents, such as transcripts, essays, etc., in support of applications that should be uploaded to the Scholarship Platform. Because the Scholarship Platform cannot be customized for each university, you are responsible for ensuring that you are aware of such requirements. Contact the PC of your university to learn more about their requirements.

Should I register for the exam and then apply for a scholarship?

No. Students should not register for the CFA Program prior to submitting an application for a scholarship. In fact, registering for the exam will block access to the scholarship application. If you erroneously register before applying for a scholarship, please email university@cfainstitute.org for next steps. You will, however, need to register after you are notified of your application's outcome, and will receive notice of next steps at that point.

Who awards the scholarships?

The Principal Contact (PC) of the affiliated university has complete control of scholarship awards.

Are scholarships transferrable?

No. Once you are selected, the scholarship may not be transferred to another student nor may it be applied to a future exam offering.

The early registration deadline is approaching, but scholarship decisions have not been made. Should I register in case I do not get a scholarship?

No. Students who applied but were not selected to receive a scholarship will receive the early registration price regardless of the time of their scholarship application submission. That is, if you submit a scholarship application at any time during the application window but are not selected for a scholarship, you will still receive the early registration price.

What if I want to start studying soon?

Level I

The Level I curriculum is now integrated into the Learning Ecosystem, so there is no option to purchase a digital version from CFA Institute. You can purchase the digital curriculum from a third-party seller, but you will not receive a credit for your purchase when registering for the exam.

Level II & Level III

The Level II and III digital curriculum and study tools can be purchased prior to registration by contacting us via telephone and providing credit card details. The cost of this purchase will be deducted from your registration fee.

For All Level Applicants

A print version of the curriculum may be purchased separately. The print curriculum is not included in the exam registration fee, therefore we do not issue credits to applicants who purchase the print curriculum in advance of exam registration. Scholarship candidates are also responsible for shipping costs and any applicable import duties and taxes related to purchasing the print curriculum.
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What happens when I submit an application?

A scholarship application confirmation email will be sent to you upon submission of your application informing you that CFA Institute has successfully received your application.

What should I be aware of if I am awarded a scholarship?

If awarded a scholarship, **you must complete the registration process** before the final registration deadline date. The Scholarship award pricing for registration (US$350) will automatically be reflected in your account.

Once awarded, how do I know when and how to register?

Once your PC has selected scholarship recipients, those students will be notified via email within 2-3 weeks of selection that they received the award. If you are awarded a scholarship, below is the text of the scholarship award email that you will receive.

Congratulations!
You have been awarded a CFA Program Student Scholarship for the [appropriate month/year] exam! To redeem your award, enroll/register here for your exam. The reduced scholarship rate of $350 USD which includes the e-Book has been applied to your account. The print curriculum is available separately for an additional $150 USD + shipping/tax/duties.

Your scholarship is associated with this email address and will not work correctly if you create an account with an alternate email. If you encounter a problem with your registration, contact us. Your scholarship will expire on [appropriate registration deadline date] which is the last day to register for the [appropriate month/year] exam. You may complete your enrollment/registration by paying with your personal credit card, check, and/or wire transfer.

Please note that all CFA Program candidates must meet the Entrance Requirements for the CFA Program and adhere to the Official Scholarship Rules.

An international travel passport is required for enrollment/registration; your name as shown on CFA Institute records must be the same as your name on the passport.

It is your responsibility to completely register for the [appropriate month/day] exam prior to the final enrollment/registration deadline of [appropriate registration deadline]. As you know, only Level I of the CFA Program exam is offered in December.

Thank you for your participation in the program. If we may be of further assistance, please contact us.

Best regards,
CFA Institute Global Scholarships Administration

What do I receive if I am NOT awarded a scholarship?

Below is the text of the email that students will receive if their application is not selected for award or if their application is not reviewed.

Dear scholarship applicant,

Thank you for submitting a CFA® Program Student Scholarship application. We regret to inform you that your scholarship application was not selected for an award.

If you need any assistance, please contact us.

Best regards,
CFA Institute Global Scholarships Administration

HOW TO APPLY FOR A STUDENT SCHOLARSHIP

To apply for a student scholarship, navigate to www.cfainstitute.org and log in to your account. If you do not have an account, you will need to create one by clicking one by selecting 'Create An Account'.
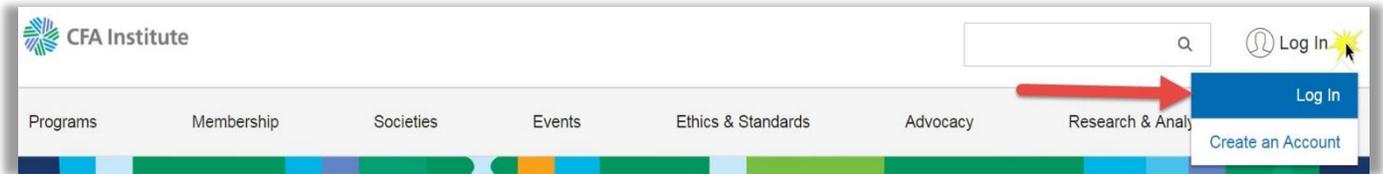
Once logged in, click on the 'Your Account' link at the top of the page.
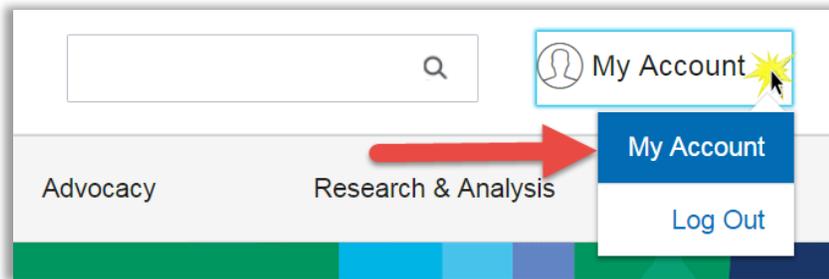
Under the 'Career Development & Learning' section click on the purple 'Scholarships' box.
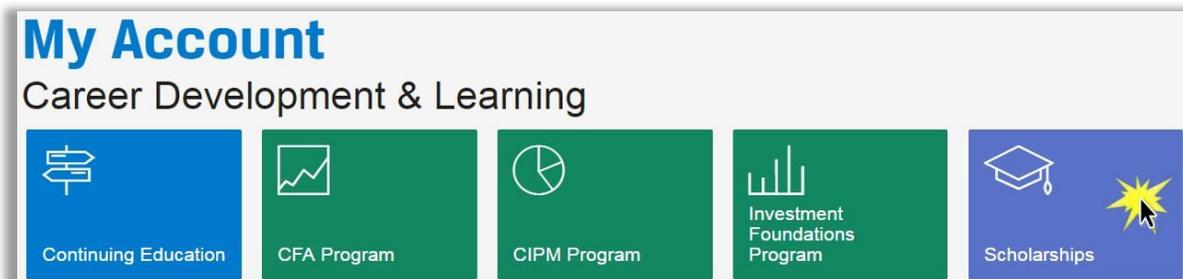
Continued….

On the next page you are presented with the full list of available scholarships. Click on the link circled in red below to apply for a student scholarship.

Please read the instructions at the top of the page. Then select the exam offering you would like to apply for by clicking on either the December (September deadline) or June (February deadline) exam offering. You are not able to apply for both exam offerings

CFA® Program University Student Scholarship Application

This scholarship is available to students of a university participating in our University Affiliation Program. Please complete the application below. Your application will be shared with the principal contact of your university for evaluation. Once an application decision has been made, we will contact you via email.

If you are selected for a scholarship award, your program enrollment fee is waived, and your exam registration fee is reduced to USD 350.

Applicants should not register for any examination prior to receiving an official scholarship decision.

Exam Selection *

○ Level I	○ Level I
Application deadline: 01 Feb 2019	Application deadline: 02 Sep 2018

Continued….

The Applicant Information section will populate your CFA Institute ID, Email Address, Given Name, Surname, Suffix, Date of Birth, and Gender. If any of this information is incorrect, continue with the application and once submitted you should email info@cfainstitute.org to correct any error in your account information.

Applicant Information

* indicates a required field

CFA Institute ID *

Email Address *

Please enter the name exactly as it appears on your international travel passport.

Given Name(s) *
First name and any middle name(s)

Surname *
Last Name

Suffix

Select Suffix ▼

Date of Birth *

Day *	Month *	Year *
	▼	

Gender *

○ Female	◉ Male	○ Prefer Not to Answer

Continued….

The below is a continuation of the Applicant Information. Please complete all required fields.

Phone *

Country / Region code *

USA +1   ▼

Phone Number (add numerical digits only)*

[   ]

Name of College / University *

Select College / University   ▼

College / University website URL *

[   ]

Education *

○ **Undergraduate**   ○ **Graduate**

Current year of study *

Select Years of Study   ▼

The next section will ask you how you learned of the Student Scholarship. You are required to select from the drop- down menu. The 'Attachments' section allows you to upload any document that may be required by your professor when submitting your application. If your professor has not instructed you to submit documentation, please proceed to the next section.

Scholarship Referral *

How did you learn about Student Scholarships?   If other, please specify

Select   ▼   [   ]

Attachments
If your professor requires supporting documents to be submitted with your scholarship application, you may attach them below. If not, please proceed to the next step.

You may attach no more than five (5) items, at a maximum size of 25MB each. We accept the following file types: PDF, DOC, DOCX, MP3, MP4, AVI, MOV

Select Attachment Type   ▼ | Choose File | No file chosen | Upload

Continued….

The Acknowledgement section is the final section of the student scholarship and you must agree to the statements to submit your scholarship. Please click the box next to 'I agree to the statements above' once you have reviewed and considered each statement.

Acknowledgement *

In consideration of my application for the CFA Institute Student Scholarship, I hereby:

1. Certify that I am a full-time undergraduate student in my final year of study or a full or part-time graduate student and that I meet the entrance requirements for the CFA Program. The principal contact is sponsoring me for a scholarship.

2. Certify that I have reviewed and will adhere to the Official Rules for the Scholarship Program.

3. Certify that I do not have any conflicts of interests as defined in the Official Rules. If any potential conflicts of interest are present, I have disclosed them fully.

4. Certify that my answers are correct and truthful.

5. Agree that if it is determined that my answers on this Application are inaccurate, false, or untruthful, I may be subject to an investigation by the CFA Institute Professional Conduct Program, disciplinary sanction, and/or ineligible to receive future scholarships.

6. I understand that the data in my application may be shared with CFA Institute member societies.

☐ I agree to the statements above.

To submit your application to your professor for review, click on **Save and Submit**. If you are not ready to submit your application for review, click on the **Save for Later**.

Note: Applicants should not register for any examination prior to receiving an official scholarship decision. Refunds are not permitted.

Contact us with any questions at www.cfainstitute.org/contactus.

Contact us to purchase the eBook curriculum in advance of registration.

Save for Later   Save and Submit

If your application is submitted successfully, you will see the below message and you will receive an email confirmation to the email address you provided when submitting your application.

CFA Institute

Thank you for applying. Your application was submitted successfully.

The Scholarships Team will contact you regarding your application before the deadline of 9/1/2018

Continued….

Shortly after clicking [Save and Submit] and receiving the above confirmation message you should also receive an email confirming we received your student scholarship application. Below is a sample of a confirmation email.

CFA Institute

CFA Institute ID:

Dear

Thank you for your interest in our CFA Institute Scholarship Programs.

We are in receipt of your June 2019 scholarship application. Our application review and processing times vary. However, you can expect a formal decision no later than one week after the application submission period ends. We will contact you if additional information is required.

You can check your application status online by visiting www.cfainstitute.org, logging in to Your Account, and clicking on the Scholarships page.

Please contact us if you need anything further.

Best regards,
Global Scholarships Administration Team

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915 East High Street
Charlottesville, VA 22902
Contact Us

CFA Institute on Twitter
CFA Institute on LinkedIn
CFA Institute on Facebook

HOW TO WITHDRAW YOUR STUDENT SCHOLARSHIP APPLICATION

Log into your CFA Institute account from any page on the cfainstitute.org website.
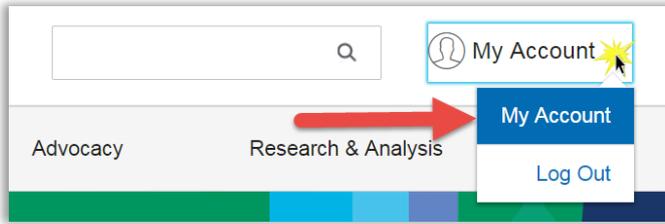
Under the 'Career Development & Learning' section click on the purple 'Scholarships' box.
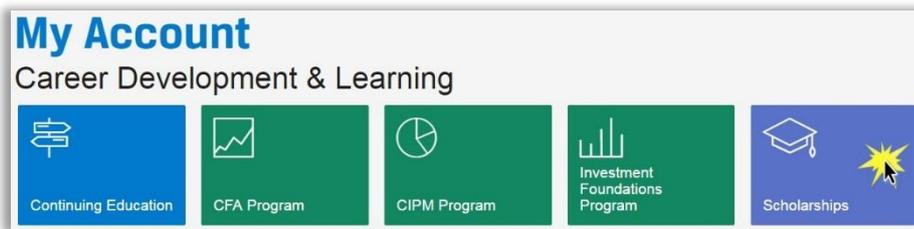
On the next page you are presented with the full list of available scholarships.
Click on the link circled in red below.

Click on 'Manage My Scholarships'
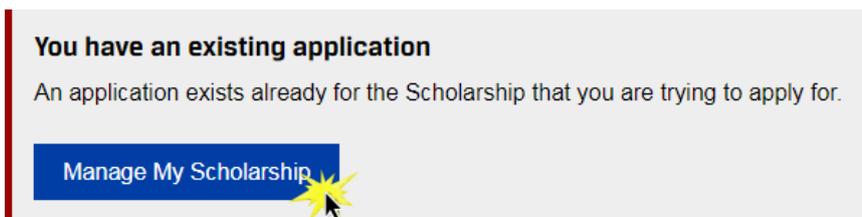
Click on the 'Withdraw' button to withdraw your current application