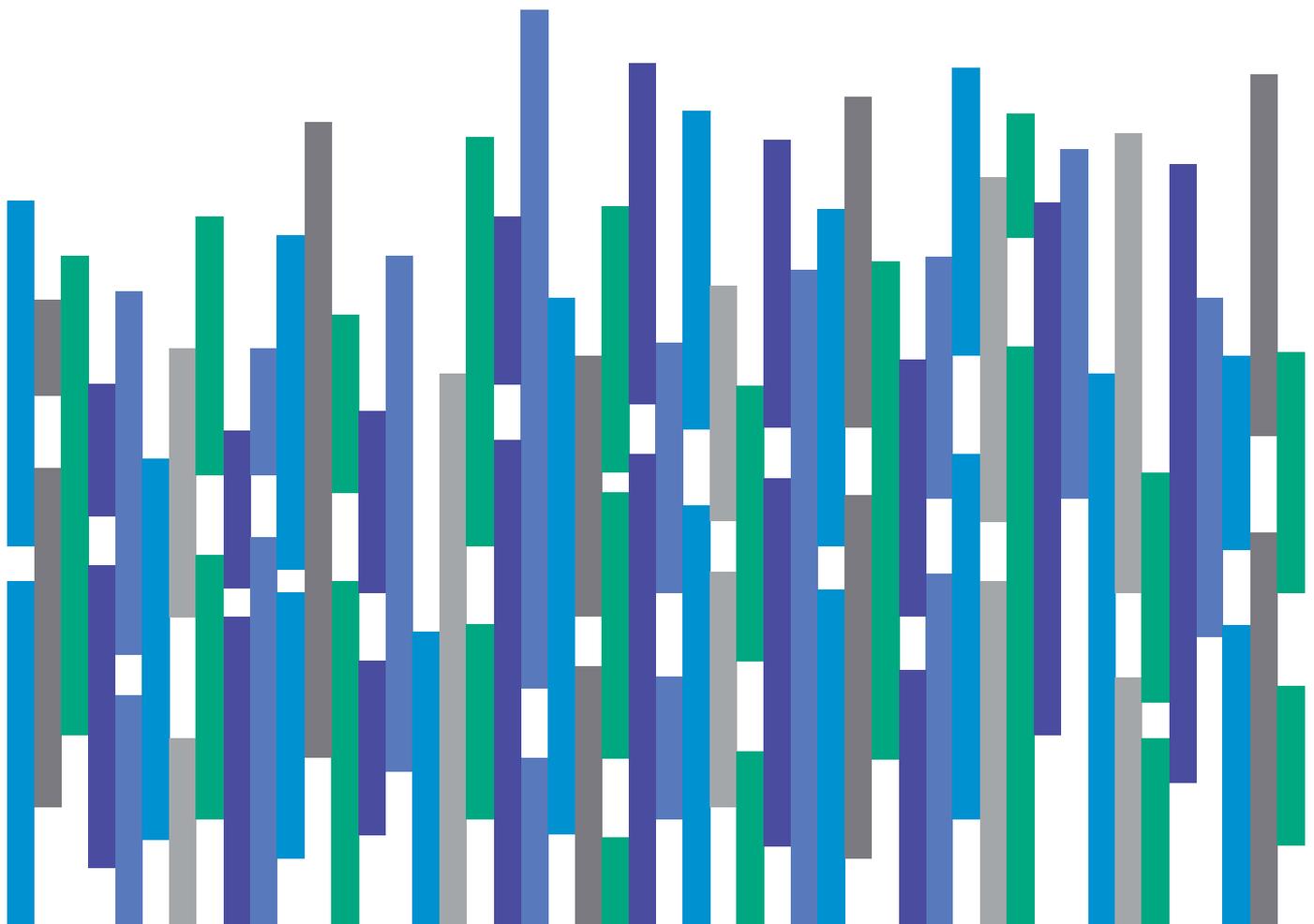


STUDENT GUIDE TO STUDENT SCHOLARSHIPS

University Affiliation Program



STUDENT GUIDE TO STUDENT SCHOLARSHIPS



CFA Institute University Affiliation Program

CFA® Program Student Scholarship Overview.....	3
Eligibility	3
Student Scholarship Award Information	3
If you are selected for award.....	3
If you are not selected for award.....	4
How to apply for the CFA Program Student Scholarship.....	4
Applicant Acknowledgement Page.....	7
Applicant Information Page.....	7
Additional Application Requirements & Final Acknowledgement Page.....	8
Frequently Asked Questions	11

CFA® Program Student Scholarship Overview

CFA Institute scholarships are part of our commitment to promoting the highest standards of ethics, education, and professional excellence. The CFA Program Student Scholarship is offered exclusively through the [University Affiliation Program](#) which consist of academic institutions that embed a significant portion of the [CFA Program Candidate Body of Knowledge \(CBOK\)](#)—including the [Code of Ethics and Standards of Professional Conduct](#)—into their curriculum.

An Affiliated University signals to their students and the industry that their curriculum is closely tied to the practice of investment management and is helpful to students preparing for the CFA Program exams.

Scholarships are awarded by the Principal Contact (PC) at each participating university and many require additional information as part of a complete application package. If applicable, before submitting your scholarship ensure you attach the necessary documents as detailed in the [Additional Requirements Before Submission](#) pdf. If your university is not, you are not required to provide any additional documentation as part of a complete application submission.

Eligibility

Students currently attending an Affiliated University and have not yet registered for their next exam are eligible to apply for a CFA Program Student Scholarship. Students must also satisfy the [Enrollment Criteria and Requirements for CFA Program](#).

Please refer to the [CFA Program Enrollment Requirements FAQs](#) for further questions.

Student Scholarship Award Information

When the Principal Contact at your university submits their decision, you will be notified by email immediately. There is no timeframe available for when your application will be reviewed as each Principal Contact makes review decision at their discretion.

If you are 'Selected for Award'...

The CFA Program Student Scholarship waives the one-time program enrollment fee, and discounts the exam registration fee to \$350, which includes access to the curriculum and all available study tools. This discounted price (\$350) will be reflected only at the final page of the exam registration checkout process.

We advise you to choose the exam offering that best accommodates your study routine and [register early](#) to ensure adequate time to prepare for the exam. Your award will be available within two weeks from the date of award and will expire one-year from the date of award. It is your responsibility to be aware of and abide by the [important exam dates](#) and [register](#) for your exam within the one-year time frame.

Once your CFA Program Student Scholarship is available the discounted price of 350 (plus any applicable local taxes) will only display on the final page of the exam registration checkout process. If it is not reflected, please contact our Global Contact Center for further assistance. ([Toll-Free Numbers](#))

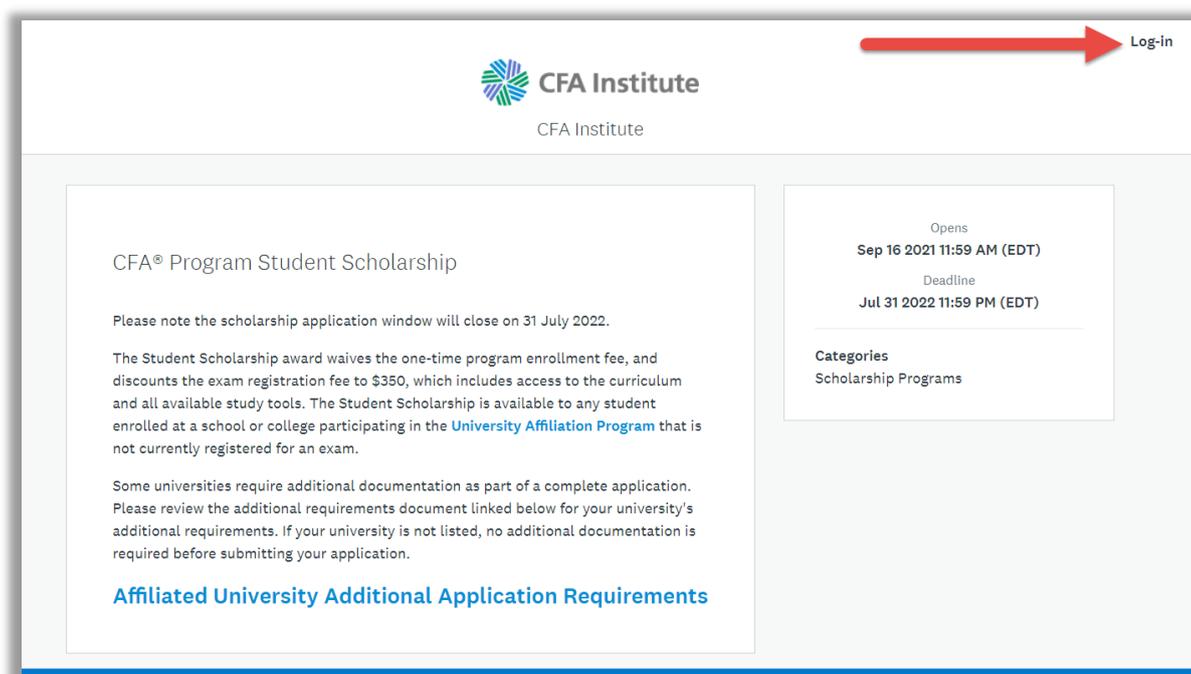
If you are 'Not Selected for Award'...

We encourage you to continue to pursue your CFA Program goals and to support you in your efforts, we would like to offer you the early exam registration fee for your next exam registration. It will be available for use within two weeks from the date of award. It is your responsibility to be aware of and abide by the [important exam dates](#) and [register](#) for the exam within the one-year time frame.

Once your exam registration discount is available you should see it reflected during the checkout process. If it is not reflected, please contact our Global Contact Center for further assistance. ([Toll-Free Numbers](#))

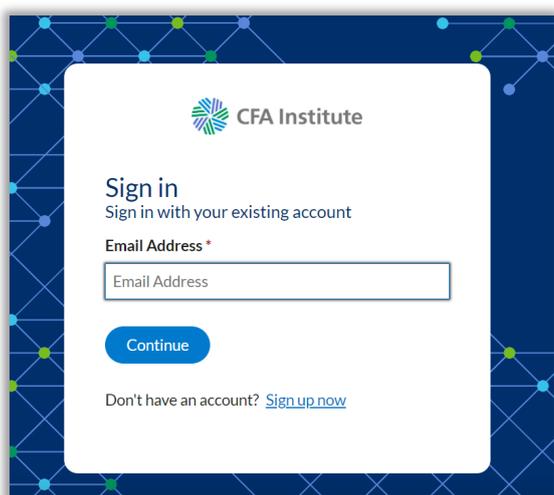
How to apply for the CFA Program Student Scholarship

1. Access the online scholarship at https://CFAI.smapply.io/prog/cfa_program_student_scholarship

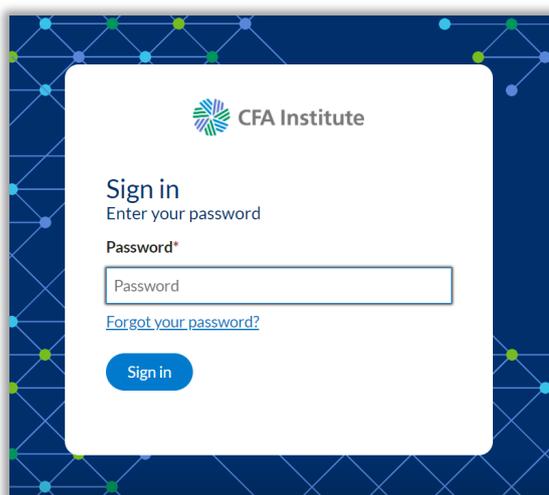


The screenshot shows the CFA Institute website for the CFA® Program Student Scholarship. At the top right, a red arrow points to a "Log-in" link. The main content area is divided into two columns. The left column contains the following text: "CFA® Program Student Scholarship", "Please note the scholarship application window will close on 31 July 2022.", "The Student Scholarship award waives the one-time program enrollment fee, and discounts the exam registration fee to \$350, which includes access to the curriculum and all available study tools. The Student Scholarship is available to any student enrolled at a school or college participating in the [University Affiliation Program](#) that is not currently registered for an exam.", "Some universities require additional documentation as part of a complete application. Please review the additional requirements document linked below for your university's additional requirements. If your university is not listed, no additional documentation is required before submitting your application.", and a link for [Affiliated University Additional Application Requirements](#). The right column contains a table with the following information:

Opens
Sep 16 2021 11:59 AM (EDT)
Deadline
Jul 31 2022 11:59 PM (EDT)
Categories
Scholarship Programs

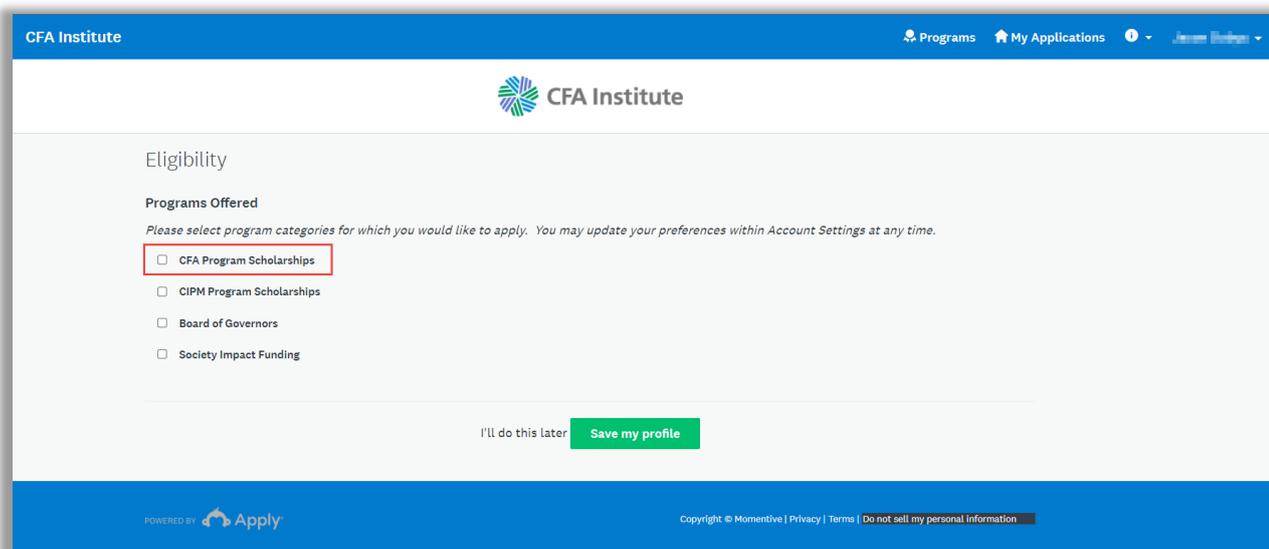
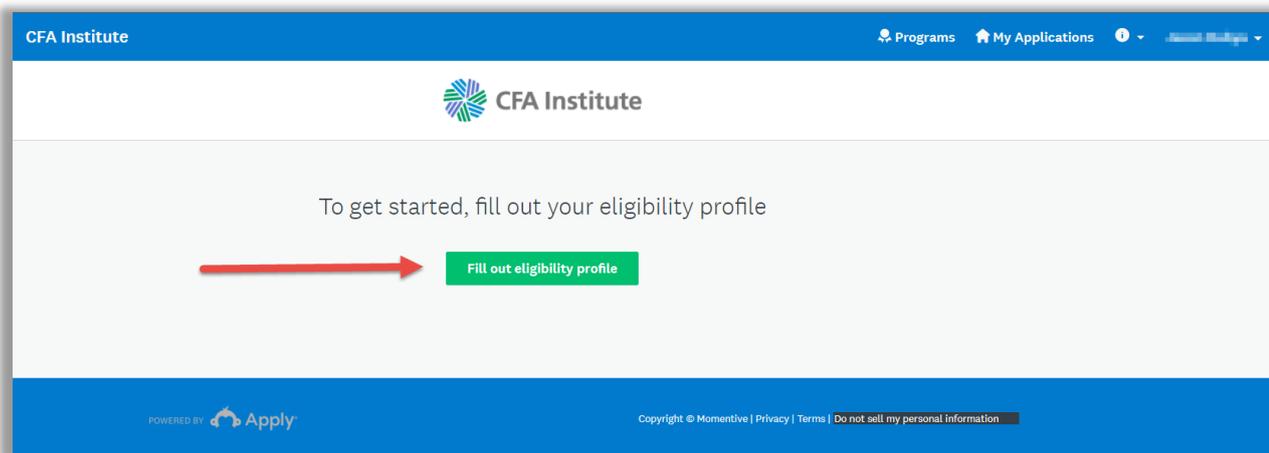
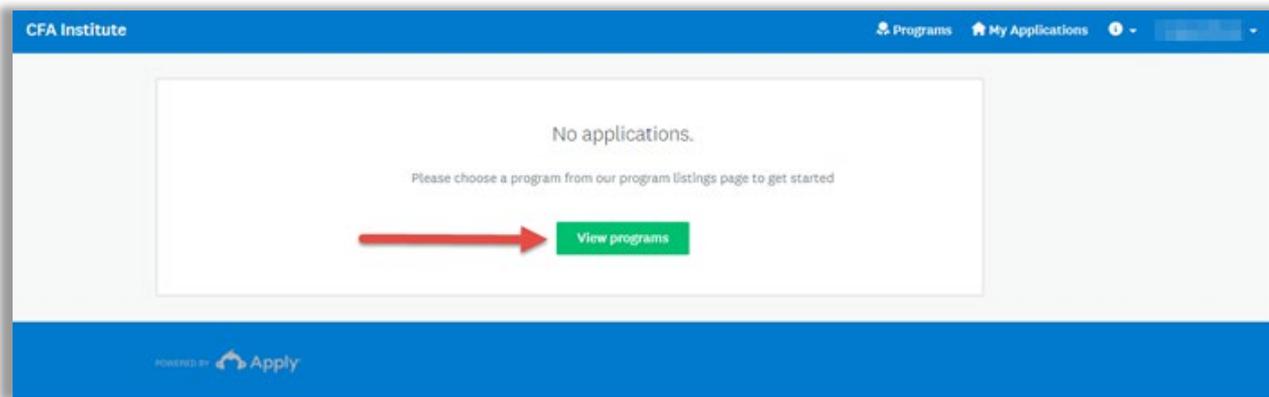


The screenshot shows the CFA Institute sign-in page. It features the CFA Institute logo at the top. Below the logo, the text reads "Sign in" and "Sign in with your existing account". There is a label "Email Address*" followed by a text input field containing "Email Address". A blue "Continue" button is positioned below the input field. At the bottom, there is a link: "Don't have an account? [Sign up now](#)".

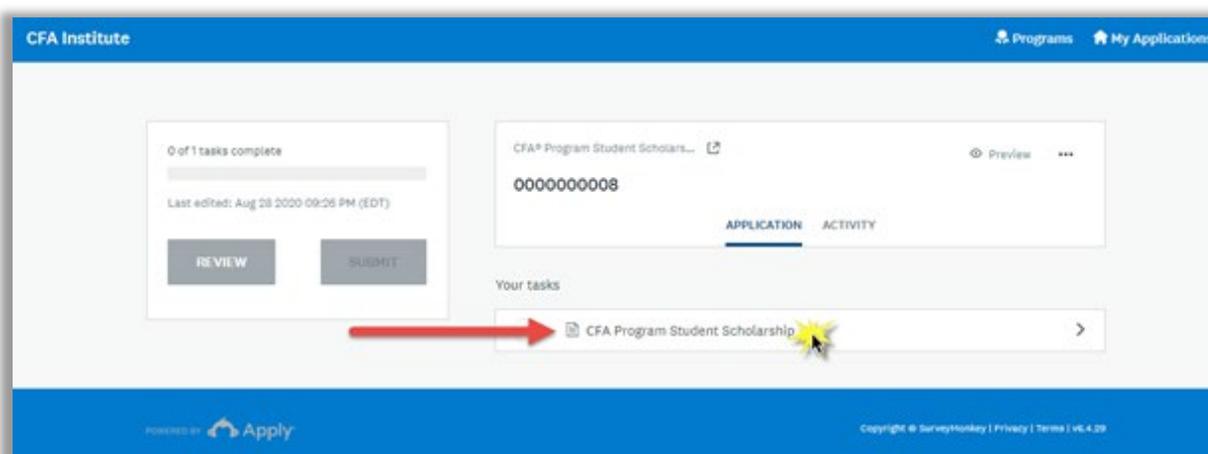
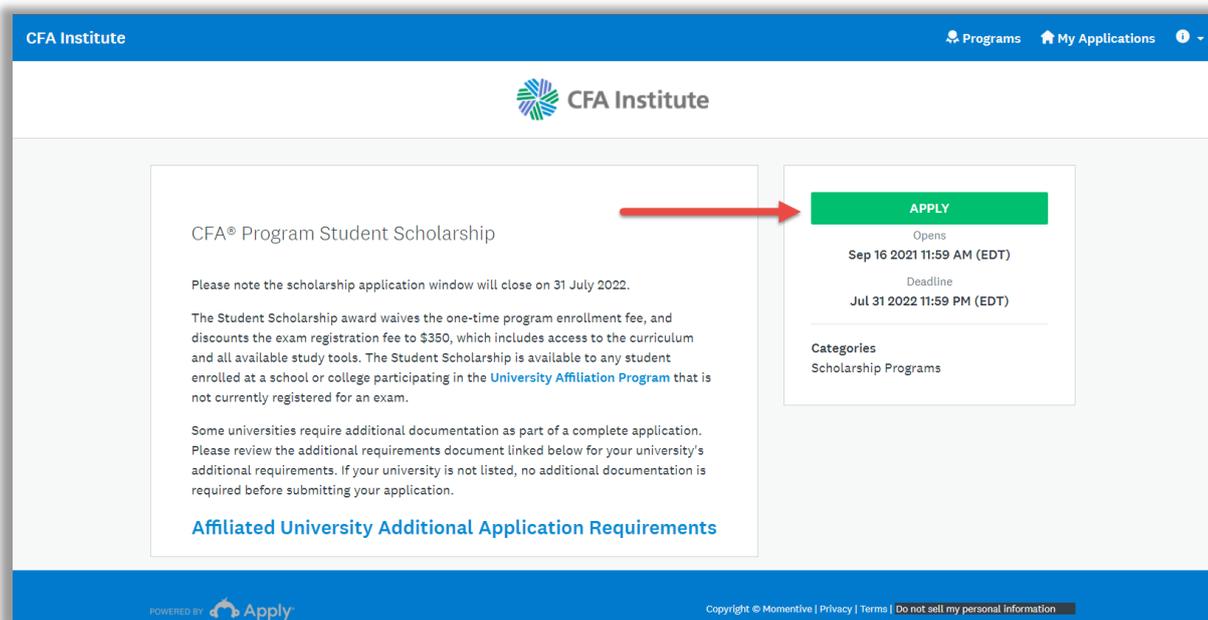
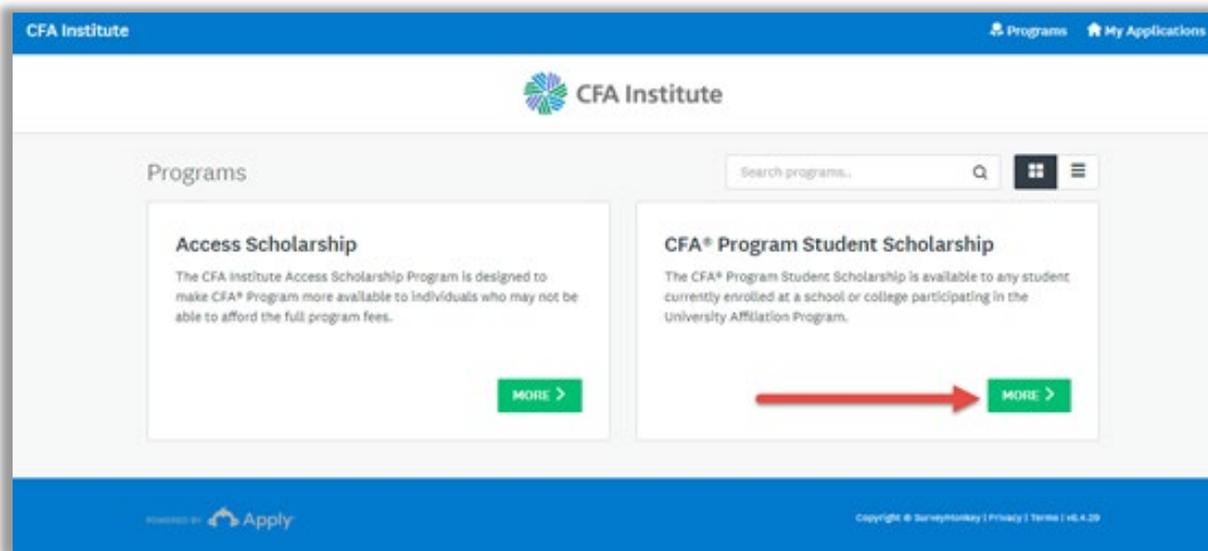


The screenshot shows the CFA Institute sign-in page. It features the CFA Institute logo at the top. Below the logo, the text reads "Sign in" and "Enter your password". There is a label "Password*" followed by a text input field containing "Password". A blue "Sign in" button is positioned below the input field. A link for [Forgot your password?](#) is located below the input field.

3. Click the green 'View programs' button to see the available scholarship programs.



5. Click 'More' in the CFA Program Student Scholarship panel.



Applicant Acknowledgement Page

The screenshot shows the 'Applicant Acknowledgement' page for the CFA Program Student Scholarship. On the left, a sidebar contains a 'Back to application' link, the scholarship title 'CFA Program Student Scholarship', ID '000000008', and a progress indicator '0 of 1 tasks complete'. The main content area is titled 'CFA Program Student Scholarship Application Form' and includes an 'Applicant Acknowledgement' section. This section contains a paragraph of text, an 'Important Note' in red, and a checkbox for policy acknowledgement. At the bottom, there are 'SAVE & CONTINUE EDITING' and 'NEXT' buttons.

CFA Institute Programs My Applications

← Back to application

CFA Program Student Scholarship
000000008
ID: 000000008

CFA Program Student Scholarship

0 of 1 tasks complete

Last edited: Aug 28 2020 09:26 PM (EDT)

REVIEW SUBMIT

CFA Program Student Scholarship

CFA Program Student Scholarship Application Form

Applicant Acknowledgement

We are excited that you have chosen to pursue the CFA Program designation. As an applicant for the Student Scholarship, you certify that you are a full-time undergraduate student in your final year of study or a full or part-time graduate student and that you meet the entrance requirements for the CFA Program.

Important Note: Applicants should not register for any examination prior to receiving an official scholarship decision. Please be aware that your application will be declined if you register for a CFA Program exam prior to a decision being made on your scholarship application.

If you have already registered for an upcoming exam, your scholarship application will not be accepted.

By clicking here, you are expressing your acknowledgement of this policy.

SAVE & CONTINUE EDITING NEXT

POWERED BY Apply

Copyright © SurveyMonkey | Privacy | Terms | v6.4.29

The screenshot shows the 'CFA Program Student Scholarship Application Form' page. The left sidebar is similar to the previous page but shows '0 of 1 tasks complete' and 'Last edited: Aug 28 2020 09:29 PM (EDT)'. The main content area is titled 'CFA Program Student Scholarship Application Form' with a 'Draft saved' indicator and a 40% progress bar. It includes a 'Select University' section with a search box for 'University of Regina', a 'Please select your current level of study' dropdown menu, and a 'Please enter the degree program' text input. Below this is the 'Applicant Information' section with fields for 'First (Given) Name', 'Last Name (Surname or Family Name)', 'Email Address', and 'Gender'. At the bottom, there are 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'NEXT' buttons.

CFA Institute Programs My Applications

← Back to application

CFA Program Student Scholarship
000000008
ID: 000000008

CFA Program Student Scholarship

0 of 1 tasks complete

Last edited: Aug 28 2020 09:29 PM (EDT)

REVIEW SUBMIT

CFA Program Student Scholarship

CFA Program Student Scholarship Application Form

*Draft saved

40%

*Indicates a required field

Select University

This scholarship is available to students of a university participating in our University Affiliation Program. Student Scholarships are evaluated by the Principal Contact at your university.

Please select the Affiliated University you are currently enrolled at: *

University of Regina

Please select your current level of study: *

Third Year Undergraduate Program

Please enter the degree program you are currently pursuing (examples: Bachelor of Science in Finance, Master of Business Administration, etc.): *

Master of Business Administration

Applicant Information

First (Given) Name

Last Name (Surname or Family Name)

Email Address

Gender *

PREVIOUS SAVE & CONTINUE EDITING NEXT

Additional Application Requirements & Final Acknowledgement Page

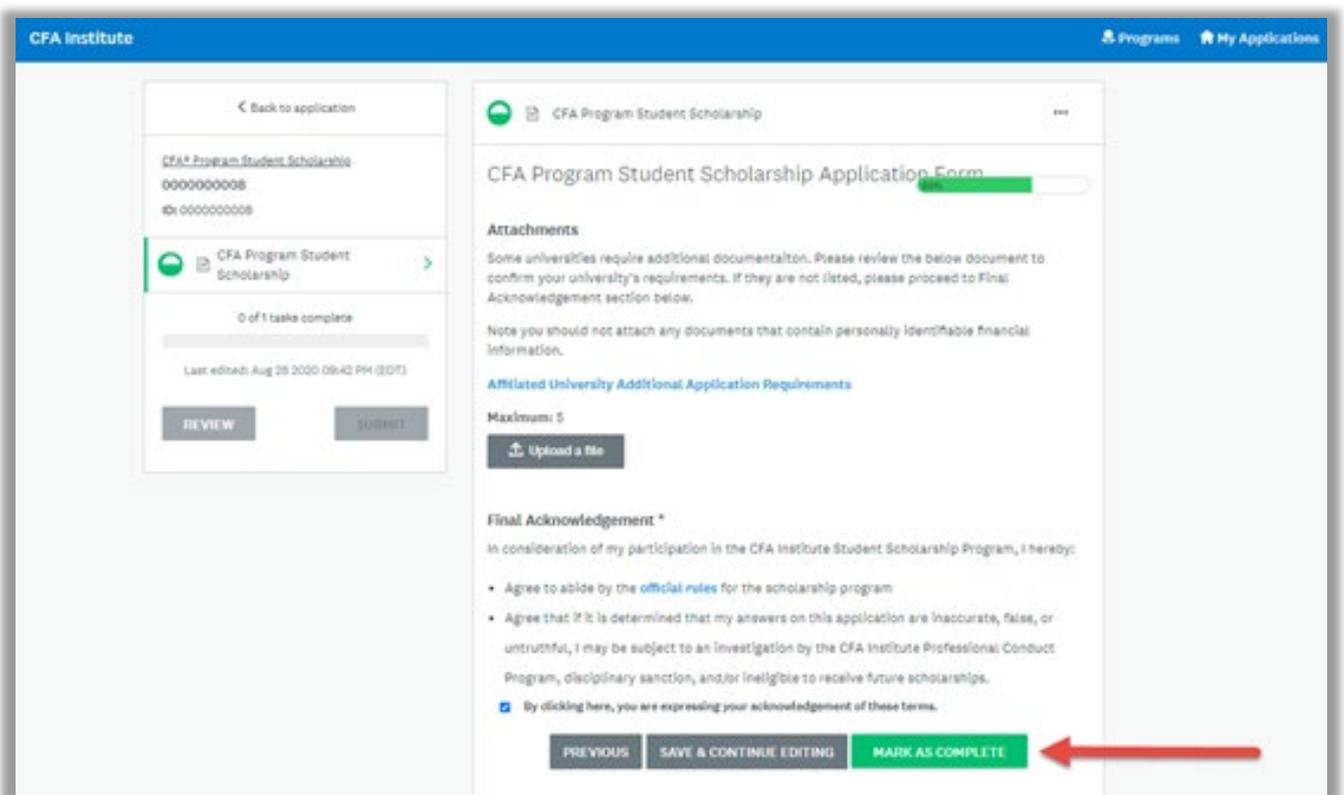
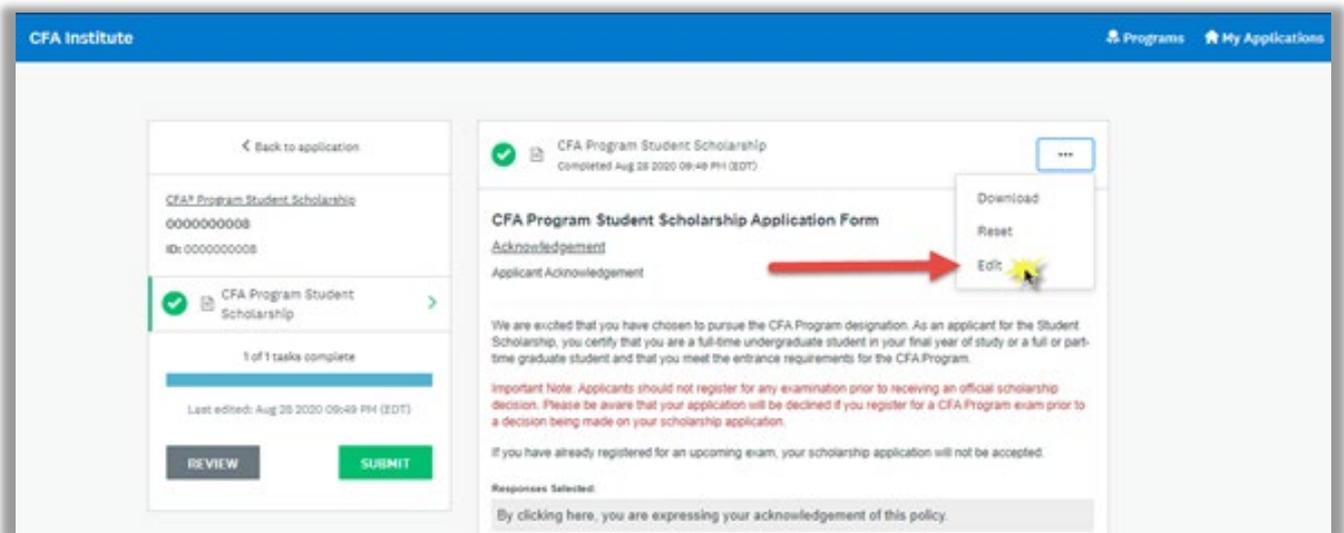
Scholarships are awarded by the Principal Contact (PC) at each participating university and many require additional information as part of a complete application package. If applicable, before submitting your scholarship ensure you attach the necessary documents as detailed in the [Additional Requirements Before Submission](#) pdf. If your university is not listed, you are not required to provide any additional documentation as part of a complete application submission.

The screenshot shows the 'CFA Program Student Scholarship Application Form' in progress. The left sidebar indicates '0 of 1 tasks complete' and 'Last edited: Aug 28 2020 09:42 PM (EDT)'. The main content area is titled 'CFA Program Student Scholarship Application Form' and includes an 'Attachments' section with instructions to review university requirements. Below this is the 'Final Acknowledgement *' section, which contains two bullet points: 'Agree to abide by the official rules for the scholarship program' and '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.' A checkbox is checked, stating 'By clicking here, you are expressing your acknowledgement of these terms.' At the bottom, there are three buttons: 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'MARK AS COMPLETE'. A red arrow points to the 'MARK AS COMPLETE' button.

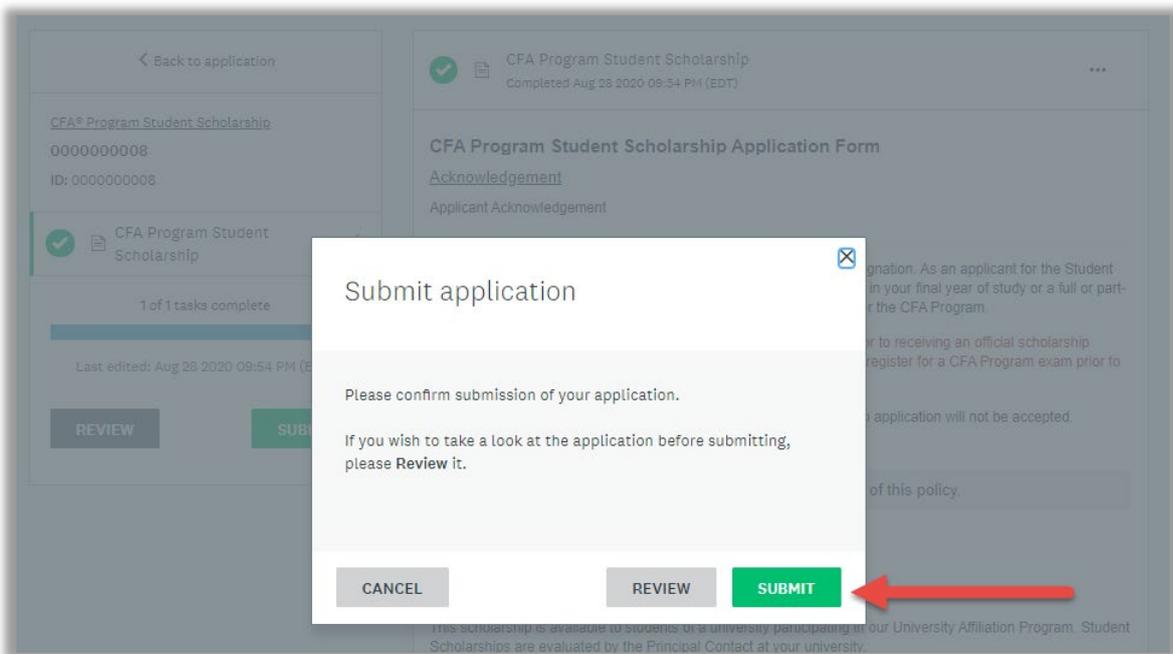
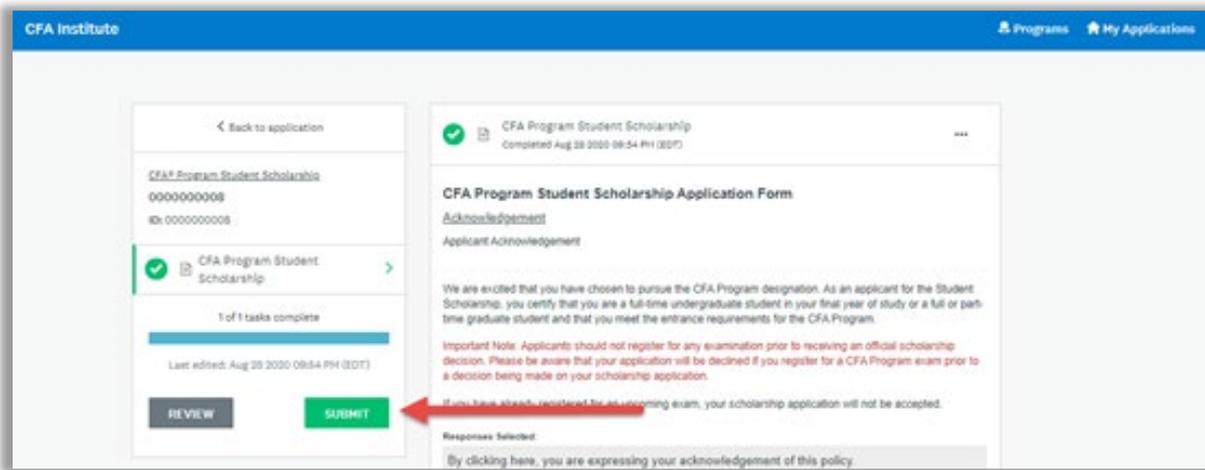
8. Click the 'Mark as Complete' button. You will then be taken to the Review page where you are able to review each of your responses. Ensure the application is complete and you are satisfied with your responses. Once you submit your application, you are no longer able to edit your responses.

The screenshot shows the 'CFA Program Student Scholarship Application Form' in the 'Review' stage. The left sidebar indicates '1 of 1 tasks complete' and 'Last edited: Aug 28 2020 09:49 PM (EDT)'. The main content area is titled 'CFA Program Student Scholarship Application Form' and includes an 'Acknowledgement' section with the text: 'We are excited that you have chosen to pursue the CFA Program designation. As an applicant for the Student Scholarship, you certify that you are a full-time undergraduate student in your final year of study or a full or part-time graduate student and that you meet the entrance requirements for the CFA Program.' Below this is an 'Important Note' and a 'Responses Selected' section with a checkbox checked, stating 'By clicking here, you are expressing your acknowledgement of this policy.' At the bottom, there are two buttons: 'REVIEW' and 'SUBMIT'. A red arrow points to the 'SUBMIT' button.

9. If you need to change any of your responses, click on the '...' and select 'Edit.'



11. When you are ready to submit your application for review, click the green 'Submit' button.



Frequently Asked Questions

What if I am having trouble logging in to my CFA Institute account?

I want to sit for a specific exam, when should I apply?

How will I know if my application was submitted successfully?

What if I no longer want to be considered for a CFA Program Student Scholarship?

Can I edit my application after I submit it?

What is the status of my application?

I have completed my exam registration; can I apply for a scholarship?

I submitted a scholarship application; can I register and then receive a refund if I am selected for award?

Who do I contact if I have a question that isn't answered here?

What if I am having trouble logging in to my CFA Institute account?

Please make sure you are using Google Chrome browser to access the platform. You may need to use an 'Incognito' window to access the platform (<http://www.cfai.smapply.io>) If using an incognito window in Google Chrome does not resolve the issue, please [call our Global Contact Center](#) for further assistance.

I want to sit for a specific exam, when should I apply?

Scholarship applications and awards are not linked to a specific exam. We encourage you to submit your application early and if awarded you can use the scholarship to register for any exam open and accepting registrations within one-year from the date of award.

How will I know if my application was submitted successfully?

Upon submission of your application you should receive the below email. If not, please email scholarships@cfainstitute.org.



CFA Institute

{{ applicant.full_name }},

We have received your CFA[®] Program Student Scholarship submission. We will contact you with a decision when the review process is complete. You should **not** register for a CFA Program exam while your scholarship application is under review.

Please [contact us](#) if you have any questions about your scholarship submission.

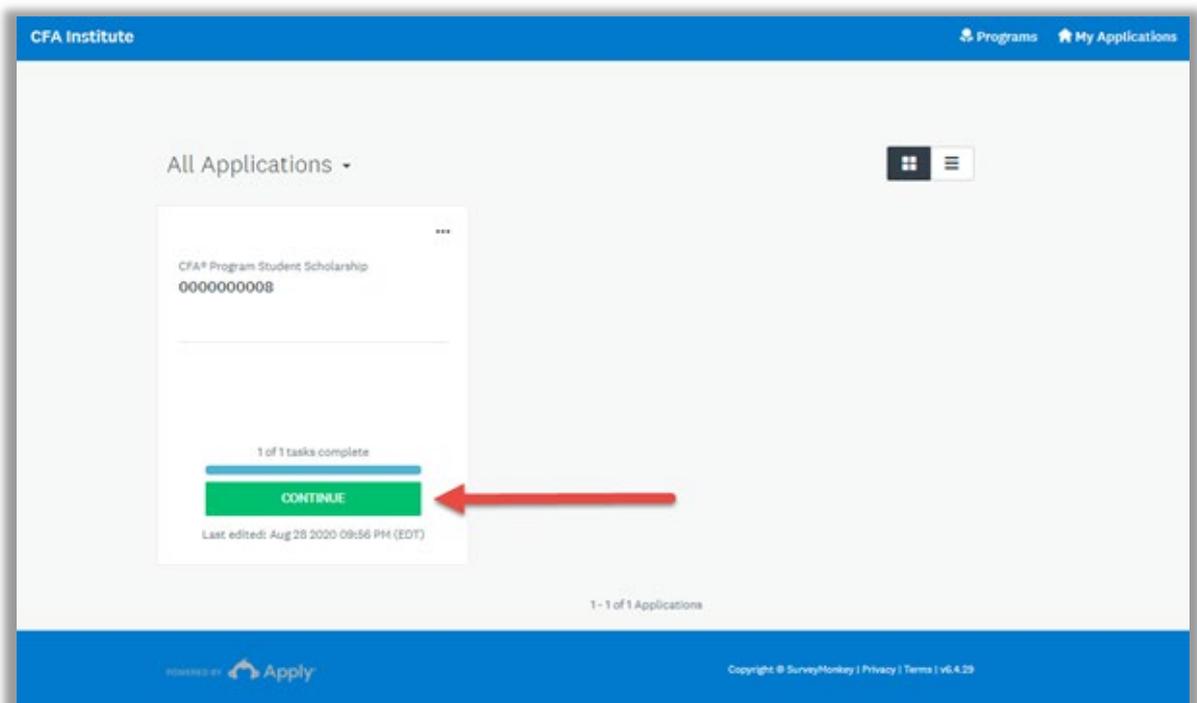
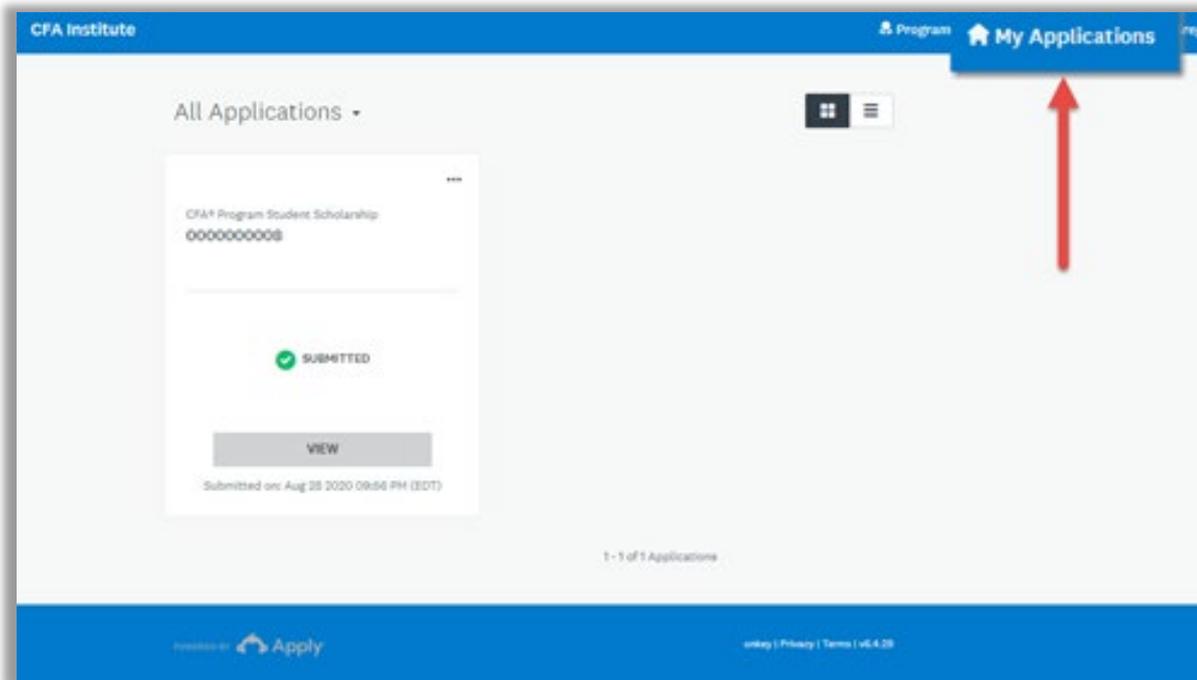
Best regards,

CFA Institute Global Scholarships Team

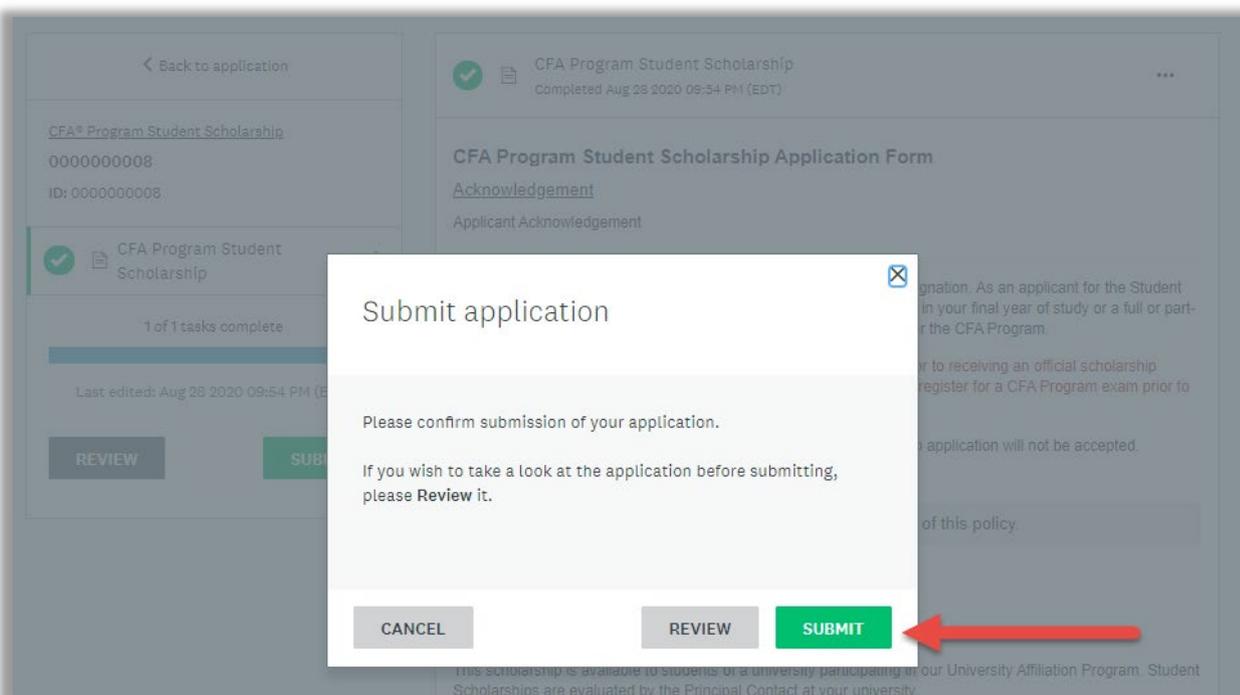
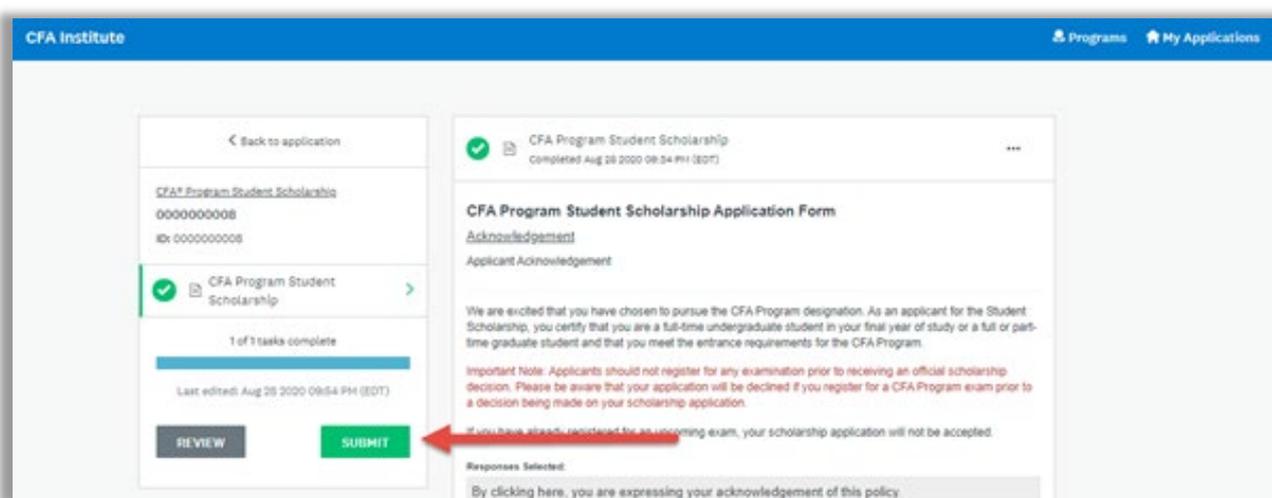
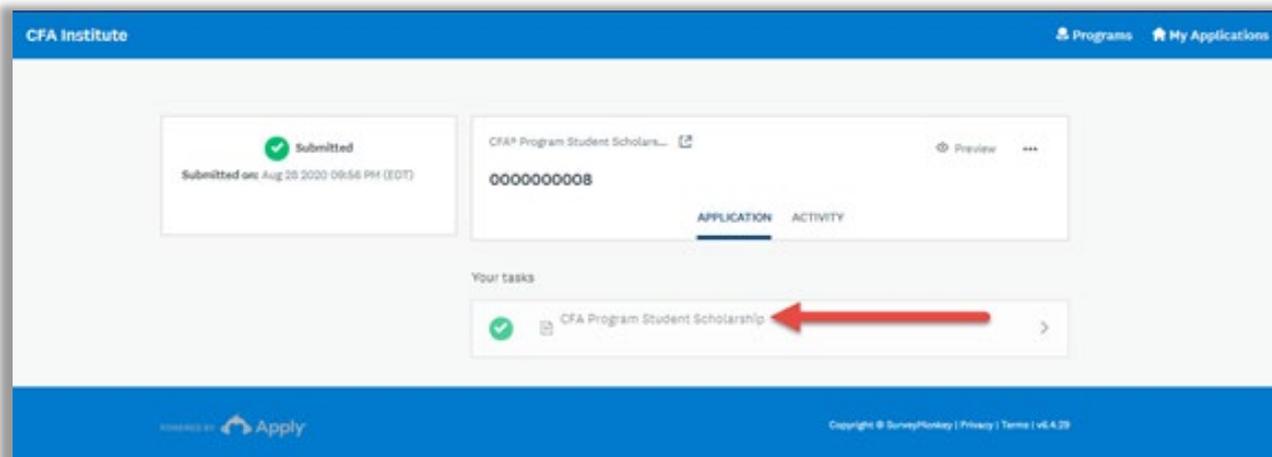
scholarships@cfainstitute.org to request your application be withdrawn. Note that this will remove your application completely. You may apply for the scholarship again as you are eligible.

Can I edit my application after I submit it?

Once you have submitted your application you are no longer able to make edits. However, if you need to update your application please email scholarships@cfainstitute.org and your application to be 'reopened.' Once you receive email confirmation that your application is open, return to your 'My Applications' page at <https://cfai.smapply.io/prog/>.



Click on the 'CFA Program Student Scholarship' link to access your application. Once you have made the needed changes, click on the green 'Submit' button.



What is the status of my application?

Once a decision is made by the Principal Contact at your university you will be notified immediately by email.

If you are '**Selected for Award**' you will receive the below email



{{ applicant.full_name }},

Congratulations! You have been awarded a CFA[®] Program Student Scholarship.

The Student Scholarship waives the one-time enrollment fee and discounts the exam registration fee to \$350. Your registration still includes full access to the curriculum and all available study tools.

Please allow two weeks from the date of this email before registering for an exam. This will ensure the discounted price is reflected in the payment section during checkout. We urge you to choose the exam offering that best accommodates your study routine and register early to ensure adequate time to prepare for the exam.

Please note that your award will expire **one year from the date of this email**. Click [here](#) to register/enroll for the exam of your choice, prior to this expiration date. It is your responsibility to be aware of and abide by the **important exam dates**.

Good luck in your pursuit of the CFA designation. Please [contact us](#) if you have any questions or concerns.

Best regards,

CFA Institute Global Scholarships Administration



{{ applicant.full_name }},

Thank you for your CFA[®] Program Student Scholarship submission. Unfortunately, your scholarship application was not selected for award.

We encourage you to continue to pursue your CFA Program goals and to support you in your efforts, we would like to offer you the early exam registration fee discount for your next exam registration. Your pricing discount will be available to redeem for up to one year from the date of this email. Please refer to the [exam fees and important dates](#) webpages for detailed information.

Good luck in your pursuit of the CFA designation. Please [contact us](#) if you have any questions or concerns.

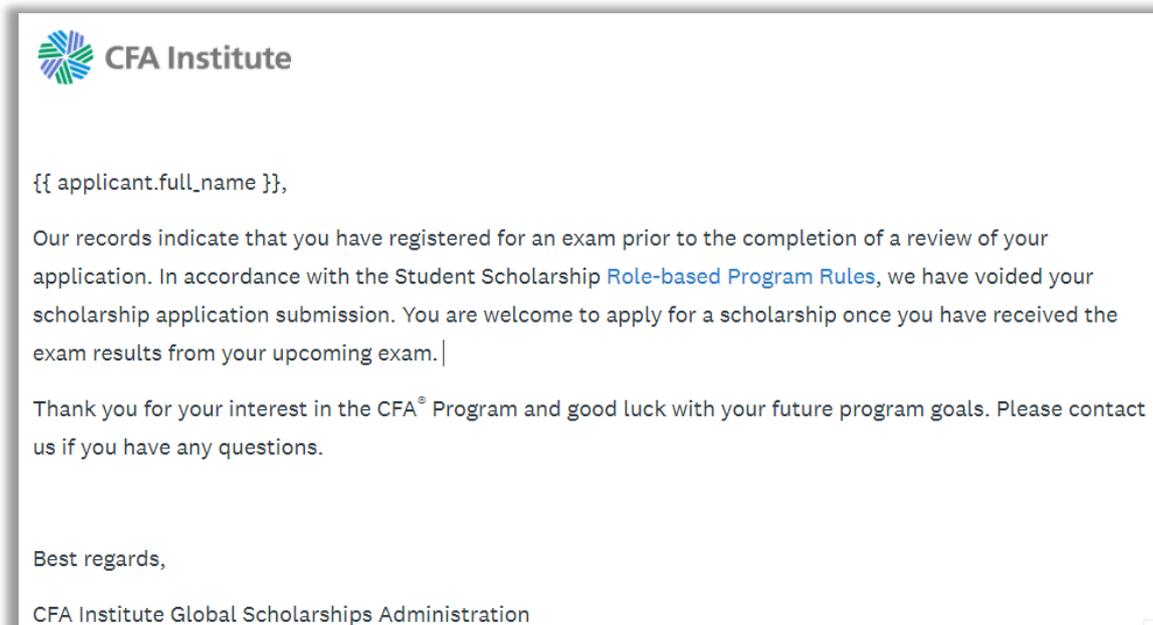
Best regards,

CFA Institute Global Scholarships Administration

I have completed my exam registration; can I apply for a scholarship?

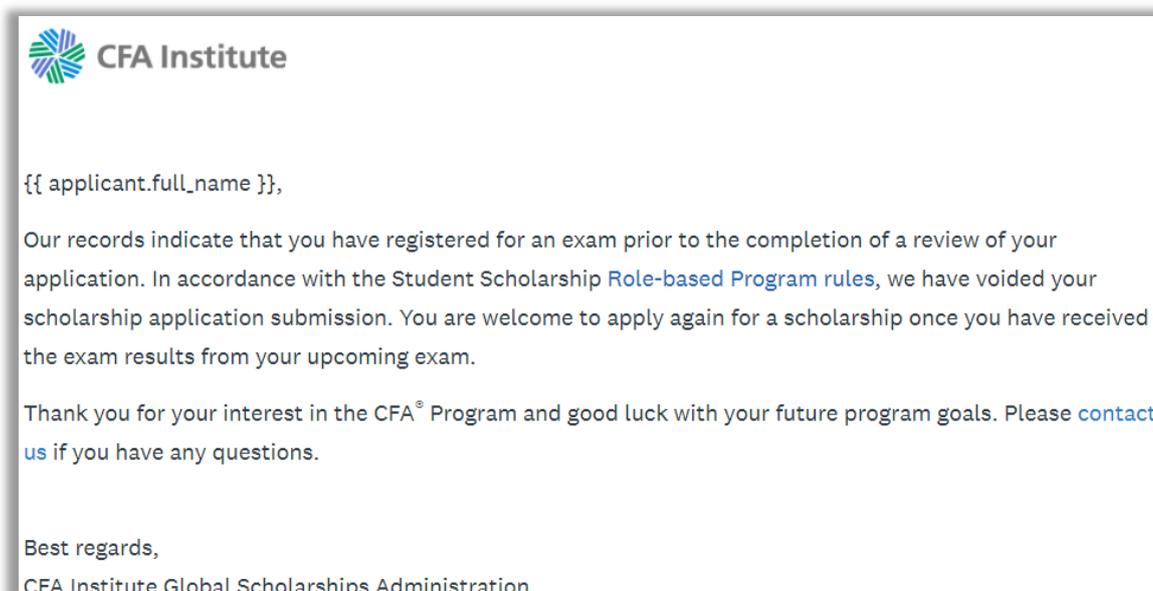
No, registered candidates are not eligible. Once you receive your exam results you are welcome to apply for a scholarship for a subsequent exam.

If have already registered and attempt to apply your submission will be declined and will immediately receive the below email.



I submitted a scholarship application; can I register and then receive a refund if I am selected for award?

No, if you register for a CFA Program exam before receiving your award decision email, your application will be voided upon review by the Principal Contact at your university. You will receive the email below if this occurs. You are welcome to apply again once your exam results from your exam are made available.



info@cfainstitute.org or [by phone](#) for immediate assistance.