

FPA of Southern Wisconsin Scholarship Program

The Financial Planning Association of Southern Wisconsin exists to promote the financial planning process and advance the financial planning profession. The Scholarship Program provides financial assistance to students pursuing the CERTIFIED FINANCIAL PLANNER™ certification.

To qualify for this Scholarship, you must be:

- A Wisconsin resident who is completing the final class in a CFP Certificate Program or registered for a CFP Review Class in preparation for the CFP Exam.
- Paying for your class and not being reimbursed from your employer.

This \$200 Scholarship is awarded three times per year, one month prior to the CFP Exam dates. The schedule is as follows:

- **Application deadline and Award Dates**
 - January 15, 2010 for February Scholarship
 - May 15, 2010 for June Scholarship
 - September 15, 2010 for October Scholarship

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

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

Scholarship determinations are at the sole discretion of the FPA of Southern Wisconsin's Career Development Committee with approval by the Board of Directors. All scholarship decisions are final. Scholarship funds will be disbursed directly to the winner, upon receipt showing tuition/fees paid. Winners will be notified by letter and awards will be presented at a meeting of the FPA of Southern Wisconsin.

Questions? Call Neil Dinndorf at 608/826-2342 or Karen Hendrickson at 414/358-9260.

Mail, fax or email required materials by **the dates listed above** to:

Scholarship Committee
FPA of Southern Wisconsin
c/o Neil Dinndorf
SVA Wealth Management
1221 John Q. Hammons Drive
Madison, WI 53717
Phone: 608/826-2342
Fax: 608/831-4243
DinndorfN@sva.com

**FPA of Southern Wisconsin
Application for Scholarship**

Due dates: January 15, 2010 for February Scholarship
May 15, 2010 for June Scholarship
September 15, 2010 for October Scholarship

Name _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Work _____

Email _____

Employer _____

Position _____

Name of School or Company Enrolled in for Final CFP Class or Review Course

Scheduled CFP Exam Date: _____

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

Why are you pursuing the CFP Certification?

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

Identify accomplishments, activities, or personal qualities that demonstrate your commitment to your professional goals.

List the name of one person who will provide a reference for you and their relationship to you (teacher, counselor, employer, etc.).

Name _____

Relationship _____ Phone _____

Your Signature

Date

Questions? Call Neil Dinndorf (608/826-2342) or Karen Hendrickson (414/358-9260)

Reference Form

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

_____ is applying for a scholarship from The FPA of Southern Wisconsin.

Please answer the following:

1. How long and in what capacity have you known the above student?
2. Please describe what attributes this individual has to successfully pursue his/her education/career goals.
3. Please list your name, address, and phone number.

Please mail, email or fax your reference letter directly to The FPA of Southern Wisconsin by **the dates listed below**. Do not return it to the student. Thank you.

Due dates:

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