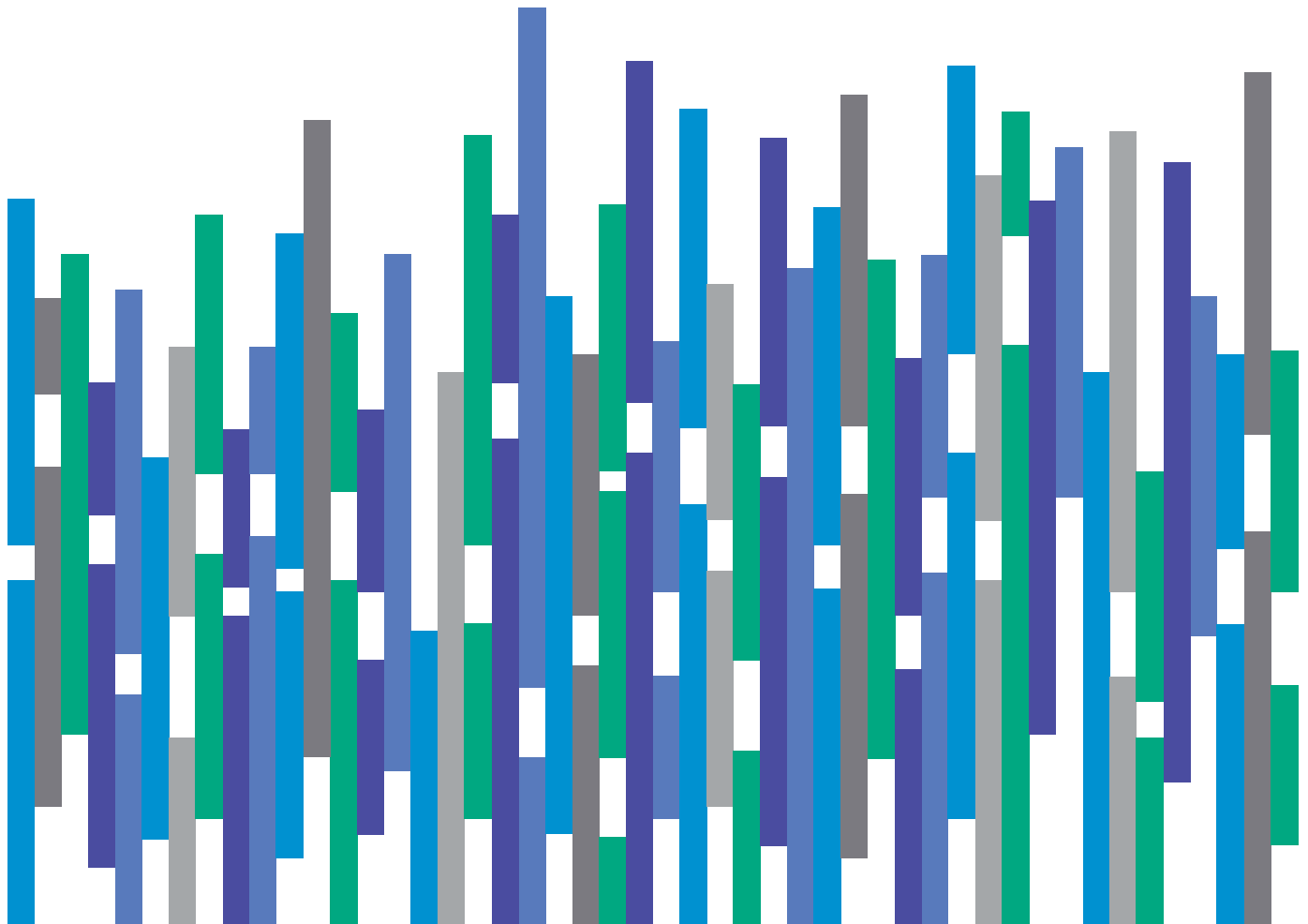


STUDENT GUIDE TO STUDENT SCHOLARSHIPS

University Affiliation Program



STUDENT GUIDE TO STUDENT SCHOLARSHIPS



CFA Institute University Affiliation Program

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Student Scholarship Overview

CFA Institute scholarships are part of our commitment to promoting the highest standards of ethics, education, and professional excellence. Student Scholarships are 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. Student Scholarships are available for CFA Program and CIPM Program exams. Affiliated universities signal to their students and the industry that their curriculum is closely tied to the practice of investment management.

Scholarships are awarded by the Principal Contact (PC) at each participating university, and some may require additional information as part of a complete application package. If applicable, during the application submission process you will have the opportunity to attach any 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.

Eligibility

Students enrolled at an Affiliated University that also satisfy the [Enrollment Criteria and Requirements for CFA Program](#) are eligible to apply.

Applicants are not required to be enrolled in the affiliated degree program and **registered candidates are not eligible** to apply for or receive a Student Scholarship.

Student Scholarship Award Information

Applications are reviewed beginning 1 September through 31 July each year. The online application platform is not available the entire month of August.

Each Principal Contact makes review decisions at their own discretion and no later than 31 July each year. When the Principal Contact at your university submits their decision, you will be notified by email immediately.

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 USD400, which includes access to the curriculum and standard study tools.

Your award will be available within five to seven business days from the date of award and will expire one-year from the date of award. 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. 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 USD400 (plus any applicable local taxes) will only be displayed 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](#))

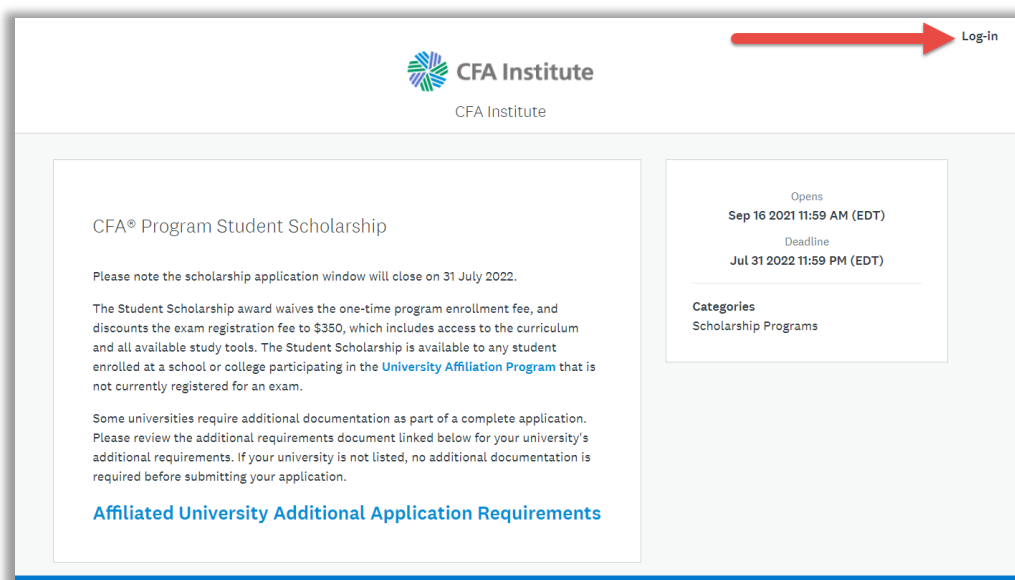
If you are 'Not Selected for Award'...

We encourage you to continue to pursue your CFA Program goals and to support you in your efforts, we would offer the early exam registration fee for your next exam registration. It will be available for use within five to seven business days 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.

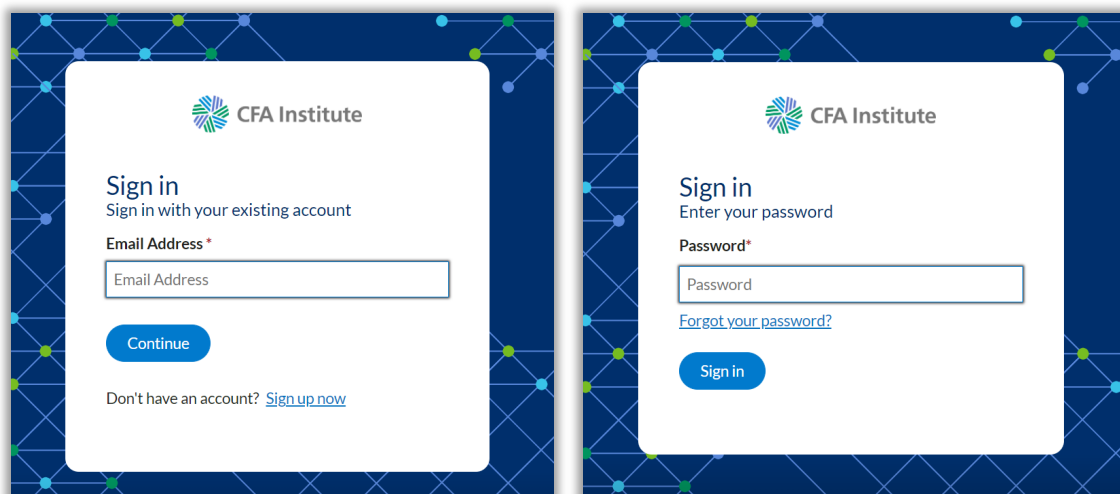
Once your exam registration discount is available you should see it reflected during the checkout process. If it is not reflected, please [contact](#) our Global Contact Center for further assistance. ([Toll-Free Numbers](#))

How to access the Student Scholarship Application

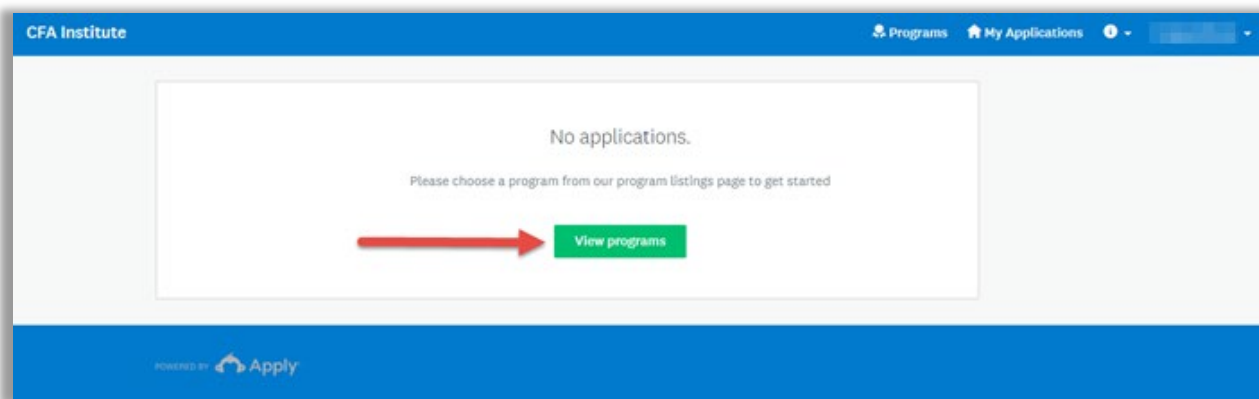
1. Access the online scholarship at https://CFAI.smapply.io/prog/cfa_program_student_scholarship



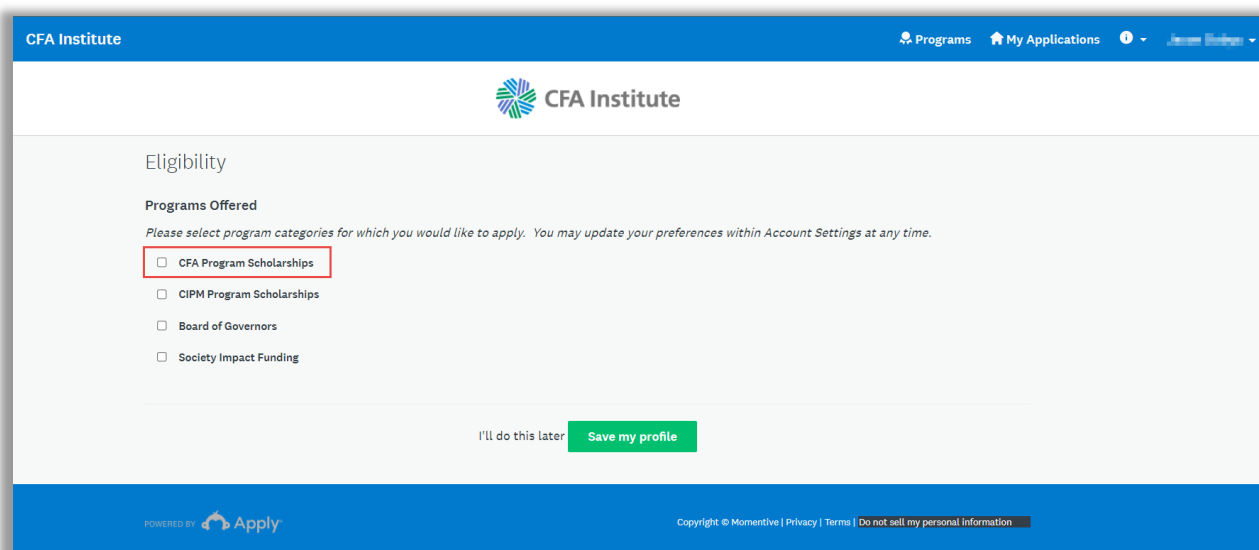
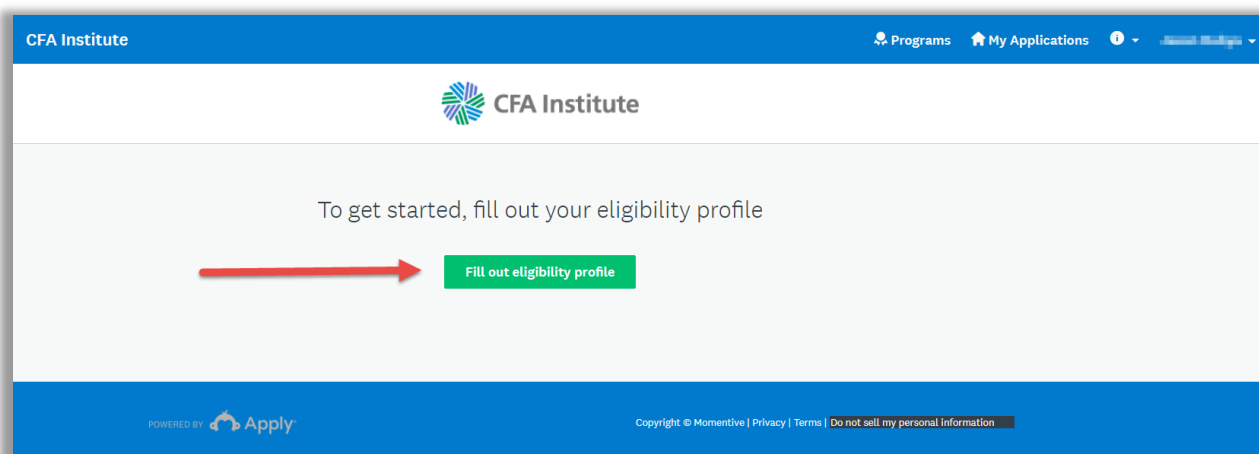
2. Log in with your CFA Institute username and password. If you don't have an account, you must create one to continue.



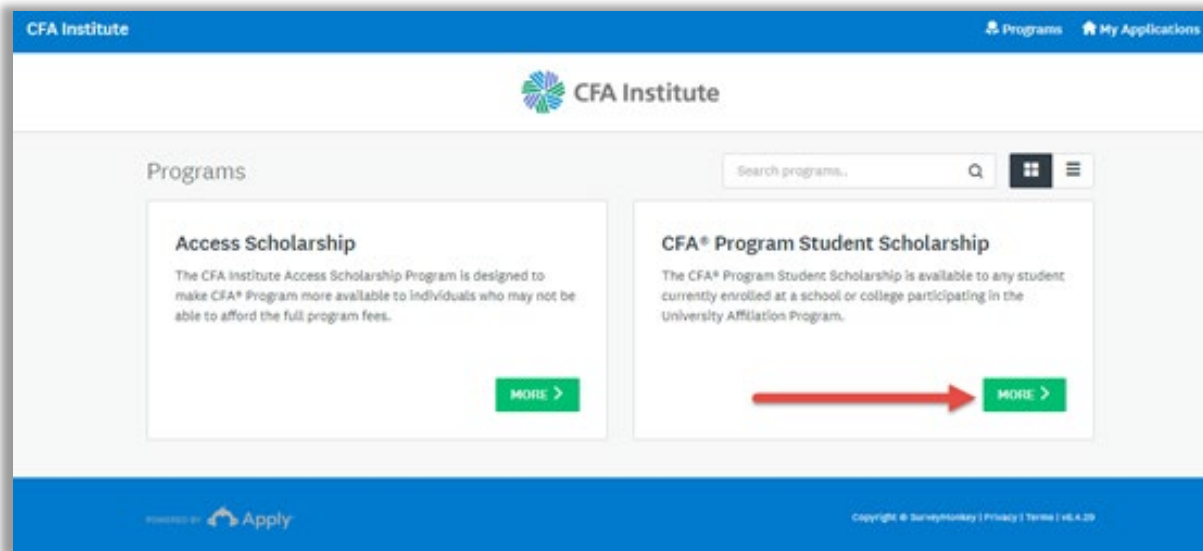
3. Click the green 'View programs' button to see the available scholarship programs.



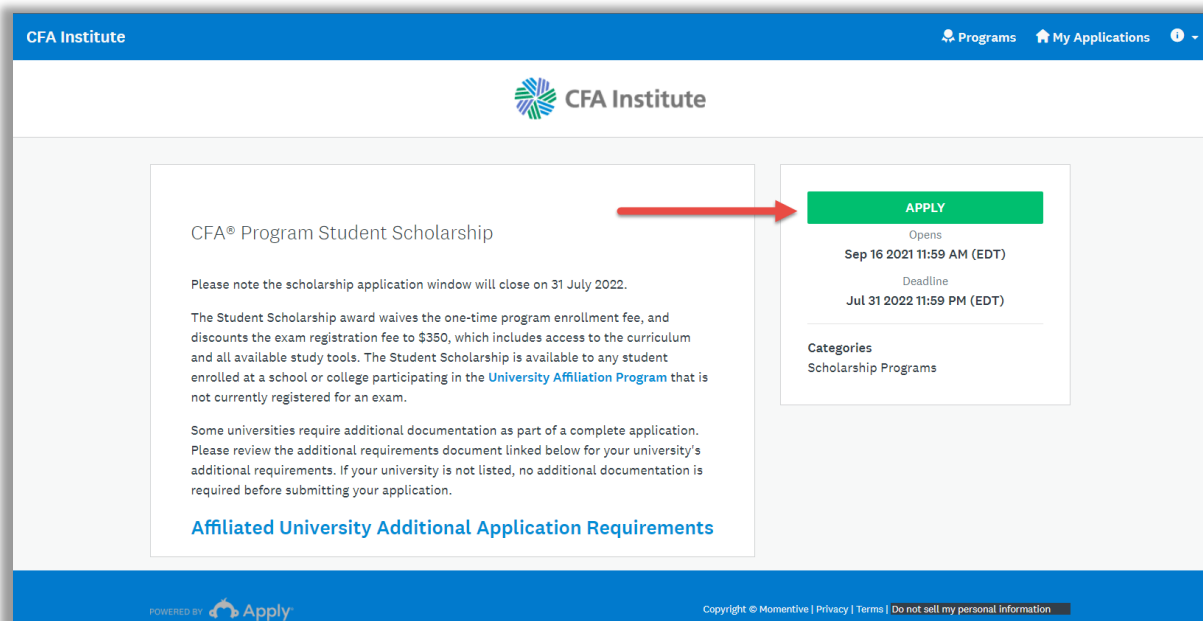
4. If it is your first time applying for a Student Scholarship complete your eligibility profile by selecting the 'CFA Program Scholarships' and 'CIPM Program Scholarships' option and click the 'Save my profile' button.



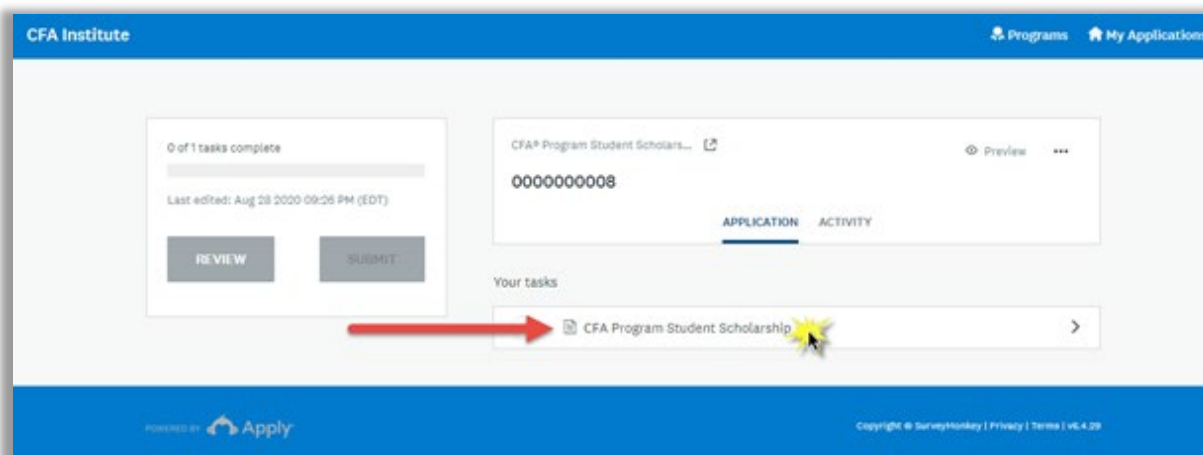
5. Click 'More' in the CFA Program (or CIPM Program) Student Scholarship panel.



6. Click 'Apply'.



7. Under 'Your tasks' select 'CFA Program Student Scholarship' to begin.



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 numbers, and a progress indicator showing '0 of 1 tasks complete'. The main content area is titled 'Applicant Acknowledgement' and includes a confirmation message: '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.' An important note states: '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.' Below this, a checkbox is checked with the text: 'By clicking here, you are expressing your acknowledgement of this policy.' At the bottom, there are two buttons: 'SAVE & CONTINUE EDITING' and 'NEXT'. The footer includes the 'Apply' logo and copyright information for SurveyMonkey.

Applicant Information Page

The screenshot shows the 'Applicant Information' page for the CFA Program Student Scholarship. The sidebar on the left is identical to the previous page, but the progress indicator now shows '0 of 1 tasks complete'. The main content area is titled 'CFA Program Student Scholarship Application Form' with a 'Draft saved' indicator and a 0% progress bar. A legend indicates that an asterisk (*) denotes a required field. The 'Select University' section includes a text box for the university name, with 'University of Regina' entered. Below this, there are two dropdown menus: one for 'Please select your current level of study:' (set to 'Final Year Undergraduate Program') and another for 'Please enter the degree program you are currently pursuing (examples: Bachelor of Science in Finance, Master of Business Administration, etc.) *' (set to 'Master of Business Administration'). The 'Applicant Information' section contains four input fields: 'First (Given) Name' (with 'John' entered), 'Last Name (Surname or Family Name)' (with 'Doe' entered), 'Email Address' (with 'johndoe@university.edu' entered), and 'Gender *' (with 'Male' selected from a dropdown). At the bottom, there are three buttons: 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'NEXT'.

Additional Application Requirements & Final Acknowledgement Page

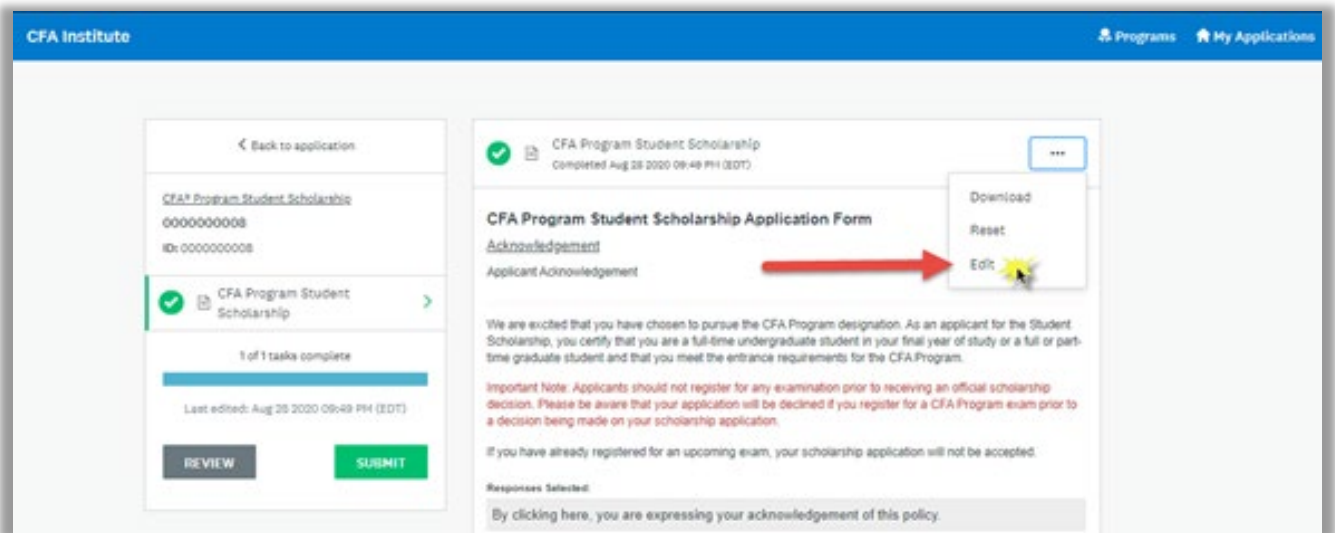
Scholarships are awarded by the Principal Contact (PC) at each participating university and many require additional information as part of a complete application package. If applicable, before submitting your scholarship ensure you attach the necessary documents as detailed in the [Additional Requirements 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.

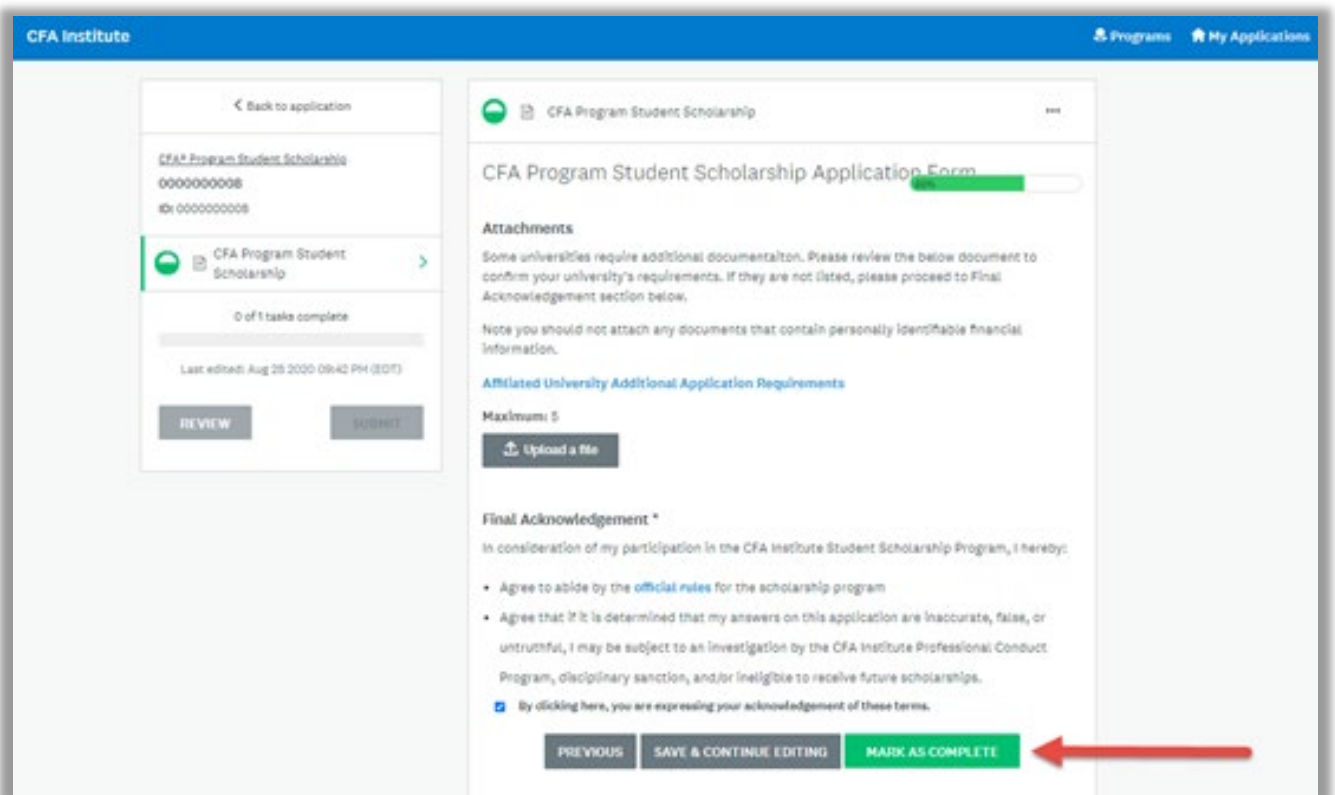
8. Click the 'Mark as Complete' button. You will then be taken to the Review page where you are able to review each of your responses. Ensure the application is complete and you are satisfied with your responses. Once you submit your application, you are no longer able to edit your responses.

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. At the bottom, there are two buttons: 'REVIEW' and 'SUBMIT'. A red arrow points to the 'SUBMIT' button.

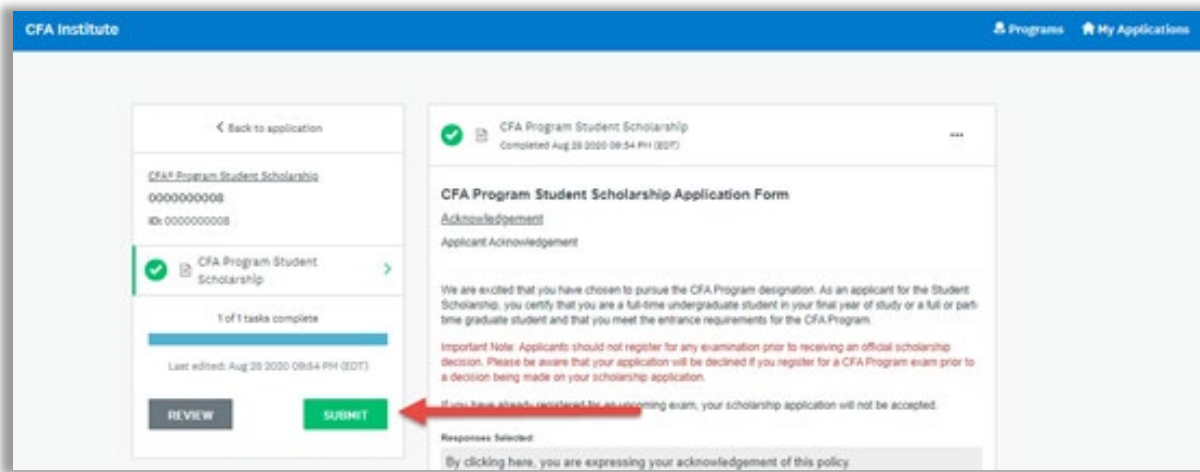
9. If you need to change any of your responses, click on the '...' and select 'Edit.'



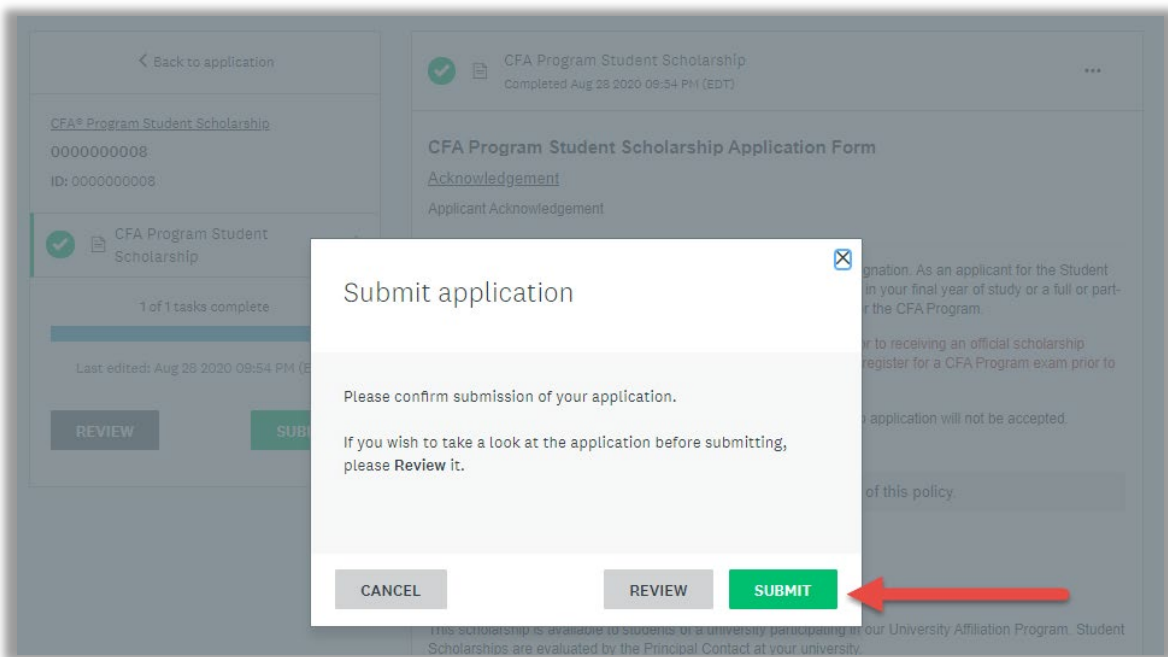
10. Your application will be opened, and you may navigate through each page to make any needed changes. Once you have made the necessary changes click the green 'Mark as Complete' button.



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



12. You must confirm your submission once more by clicking 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 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?

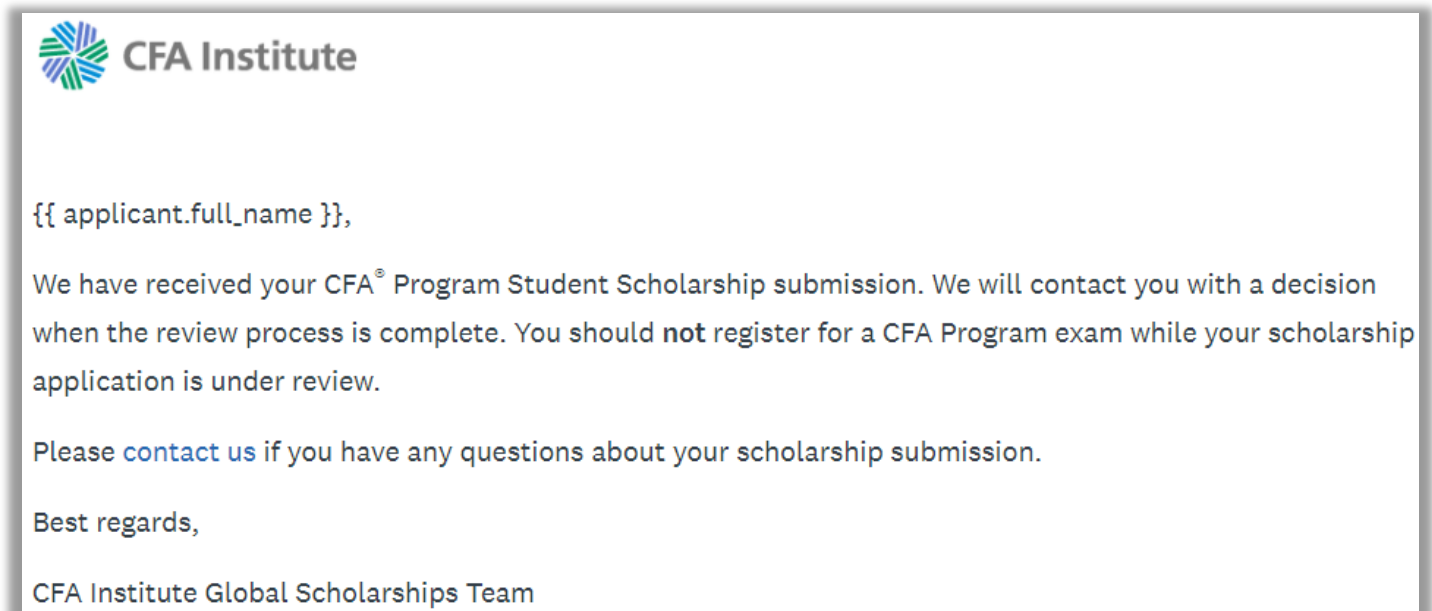
Please make sure you are using Google Chrome browser to access the platform. You may need to use an 'Incognito' window to access the platform (<http://www.cfai.smapply.io>) If using an incognito window in Google Chrome does not resolve the issue, please [call our Global Contact Center](#) for further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

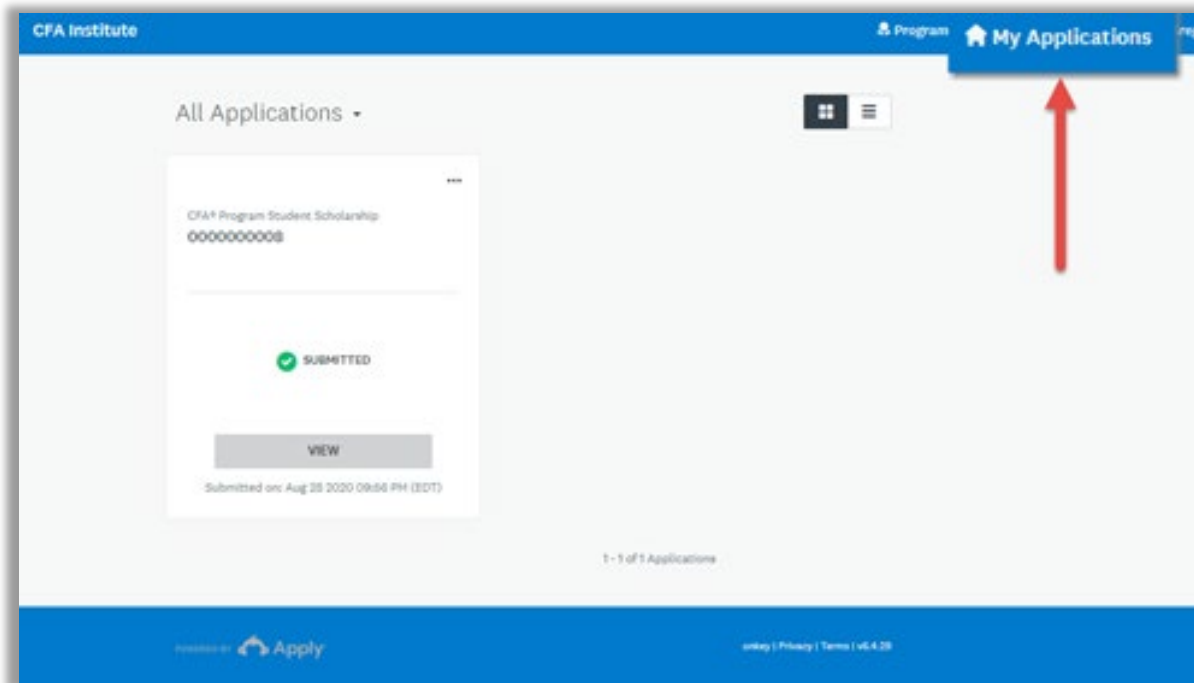


What if I no longer want to be considered for a Student Scholarship?

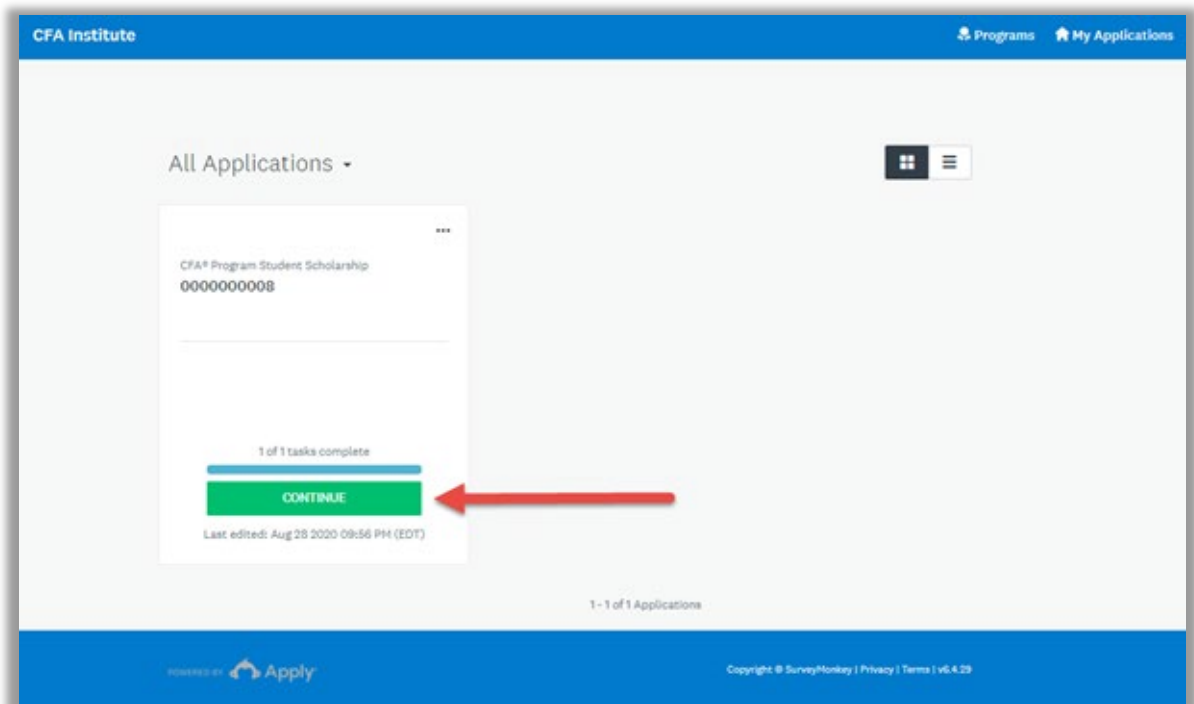
Please email scholarships@cfainstitute.org to request your application be withdrawn. Note that this will remove your application completely. You may apply for the scholarship again as you are eligible.

Can I edit my application after I submit it?

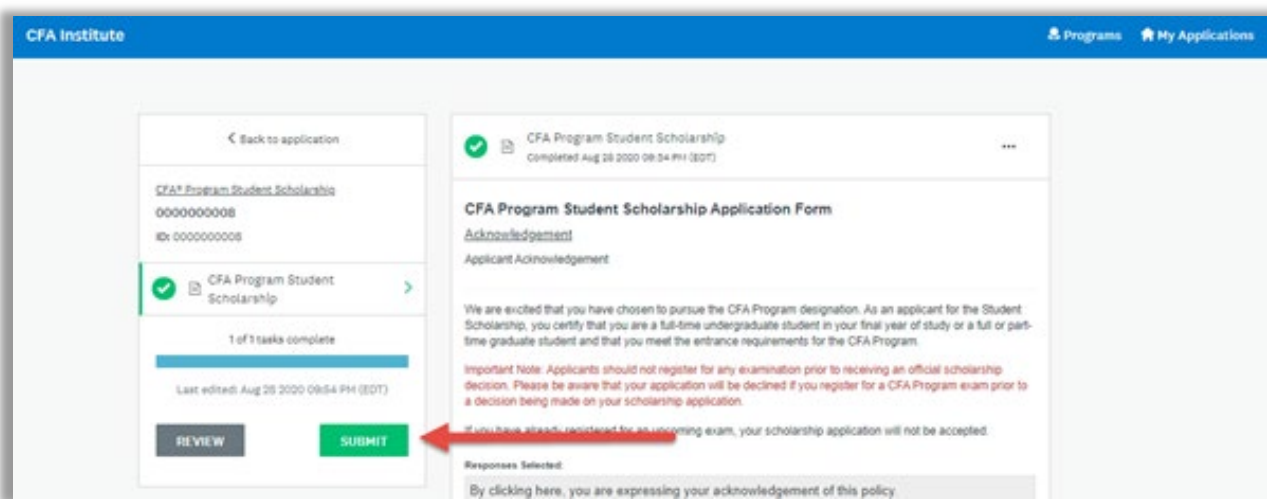
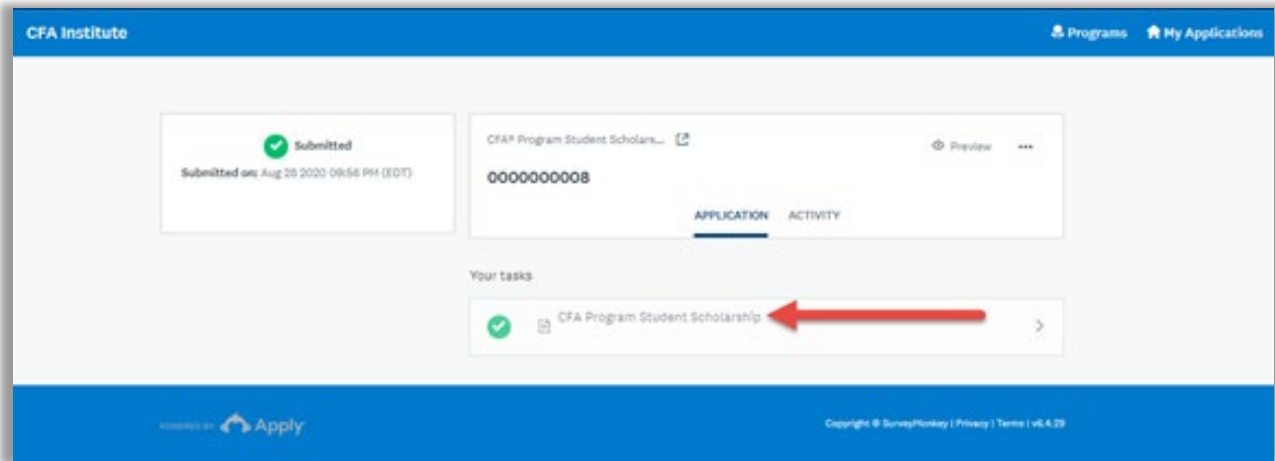
Once you have submitted your application you are no longer able to make edits. However, if you need to update your application, please email scholarships@cfainstitute.org and request that your application be 'reopened.' Once you receive email confirmation that your application is open, return to your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



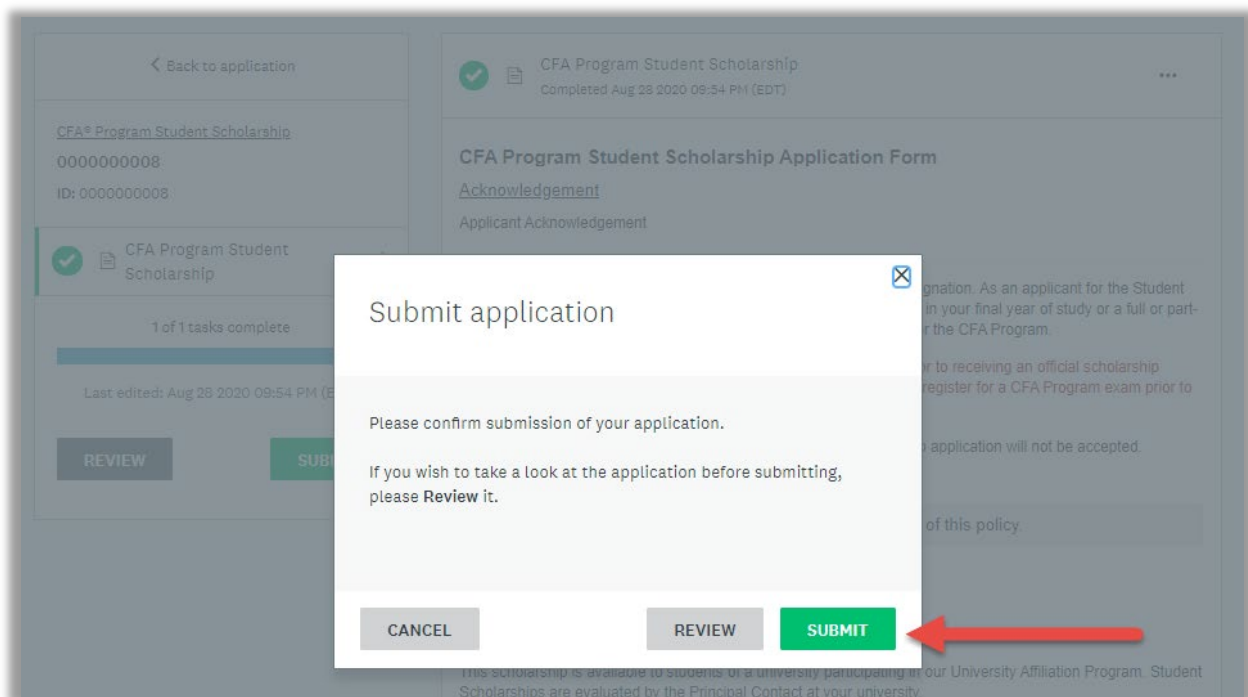
Click on the green 'Continue' button to make any needed changes to your application.



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.




Click the green 'Submit' button to submit your CFA Program Student Scholarship application.



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 a message like the below email



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 USD400.

Please allow seven to ten business days from the date of this email before registering for an exam. This will ensure the scholarship discount is reflected in your account. 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](#).

Important registration note: The full exam pricing will display on your initial exam registration page. You will see the final, discounted pricing reflected in the payment section during the checkout process. Please be certain of the [payment method](#) you wish to use before you reach the checkout. If you exit the registration process or change your payment method, the discounted rate will revert to the full fee.

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

If you are '**Not Selected for Award**' you will receive a message like the below email



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

To support you in your efforts to pursue your CFA Program goals, we would like to offer you the early exam registration fee pricing for your next exam registration. New Level I candidates are still responsible for the [one-time enrollment fee](#). Please allow seven to ten business days from the date of this email to ensure the early exam registration pricing is applied to your account. The early registration pricing will display only on the final page of the exam registration process and will expire one year from the date of this email.

Click [here](#) to register/enroll for the exam of your choice. It is your responsibility to be aware of and abide by [exam dates and applicable fees](#).

Important registration note: The full exam fee(s) will display on your initial exam registration page. You will see the final, early exam registration fee reflected in the payment section during the checkout process. Please be certain of the [payment method](#) you wish to use before you reach the checkout. If you exit the registration process or change your payment method, the early exam registration rate will revert to the full fee.

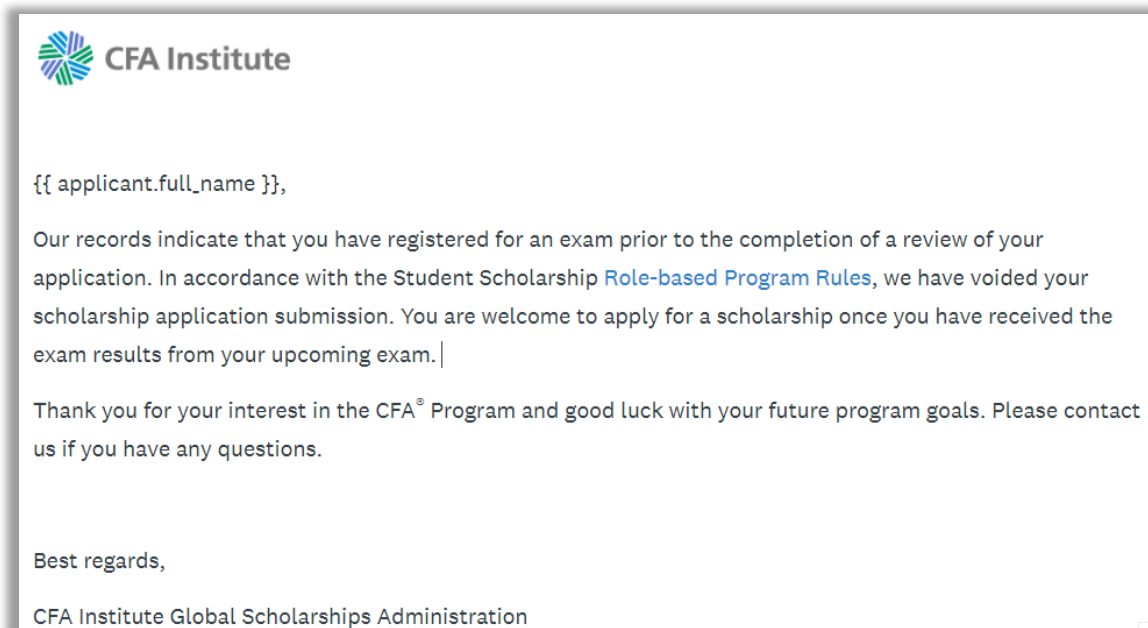
Please [contact us](#) if you have any questions or concerns.

Best regards,
CFA Institute Global Scholarships Administration

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

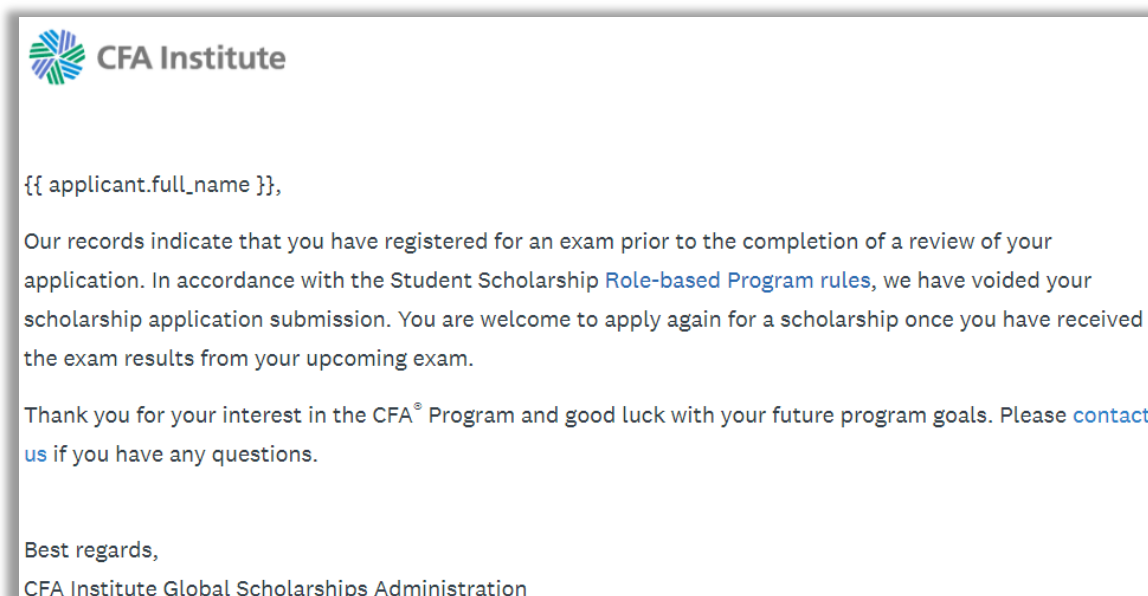
No, registered candidates are not eligible. Once you receive your exam results you are welcome to apply for a scholarship for a subsequent exam.

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.



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

For questions regarding the CFA Program Student Scholarship please contact our [Global Contact Center](#) or [by phone](#) for immediate assistance.