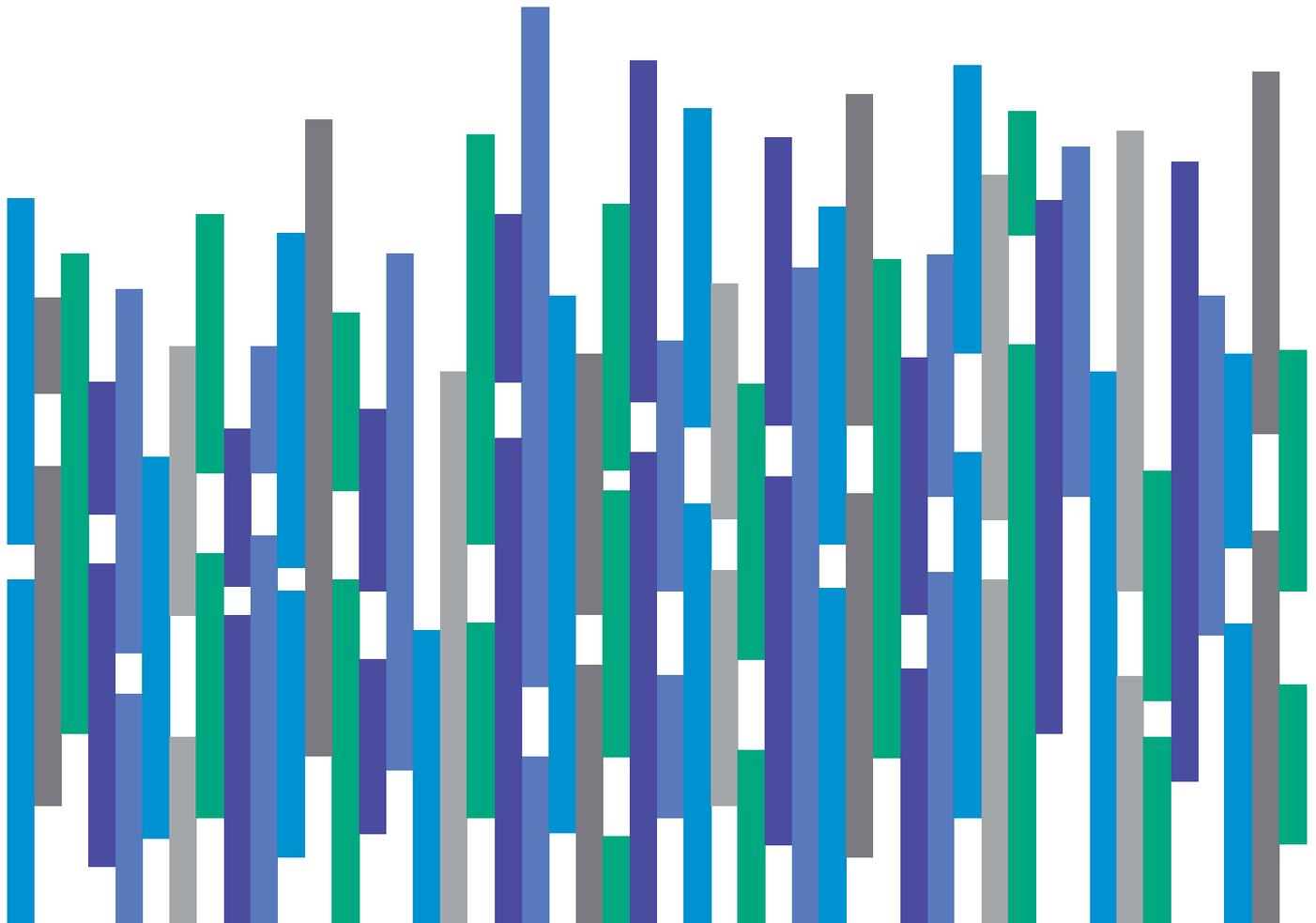CFA PROGRAM STUDENT SCHOLARSHIPS

Student Guide

CFA PROGRAM STUDENT SCHOLARSHIPS

Student Guide

CFA Institute
University Affiliation Program

CFA® Program Student Scholarship Overview

CFA Institute scholarships are part of our commitment to promoting the highest standards of ethics, education, and professional excellence. Our scholarships help make the CFA charter more attainable and give more people an opportunity to advance their career.

The **University Affiliation Program** 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 to employers that their curriculum is closely tied to the practice of investment management and is helpful to students preparing for the CFA® Program exams.

As a student enrolled at an Affiliated University you can apply for a CFA Program Student Scholarship. These scholarships are awarded by the Principal Contact (PC) at your university at their discretion. Some may have **additional qualifications and requirements** as part of a complete scholarship application. It is your responsibility to ensure you attach these before submitting your scholarship. In some cases, there may be more than one PC at an Affiliated University. If you are not sure who your university's PC is, please contact our Global Contact Center at **info@cfainstitute.org** or **by phone**.

Eligibility

To apply for a CFA Program Student Scholarship, you must:

- Not be currently registered for a CFA Program exam.
- Be enrolled at an affiliated university.
  - You are not required to be enrolled in the affiliated degree program to apply.
- Satisfy the enrollment requirements detailed here: **https://www.cfainstitute.org/en/programs/cfa/charter**.

Student Scholarship Award Information

When a decision has been made on your application submission you will be notified via email. There is no timeframe available for when your application will be reviewed. We encourage you to reach out to the PC at your university if you have any questions on the status of your application.

If you are selected for award…

The 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 during the 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 for use three weeks from the date you receive your award decision email. Your award will expire one year from the date of this email. 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 award is available the discounted price of $350 (plus any applicable local taxes) should display during the checkout process. Do not submit payment if that price is not reflected. Please contact our Global Contact Center at **info@cfainstitute.org** or **by phone** for further assistance.
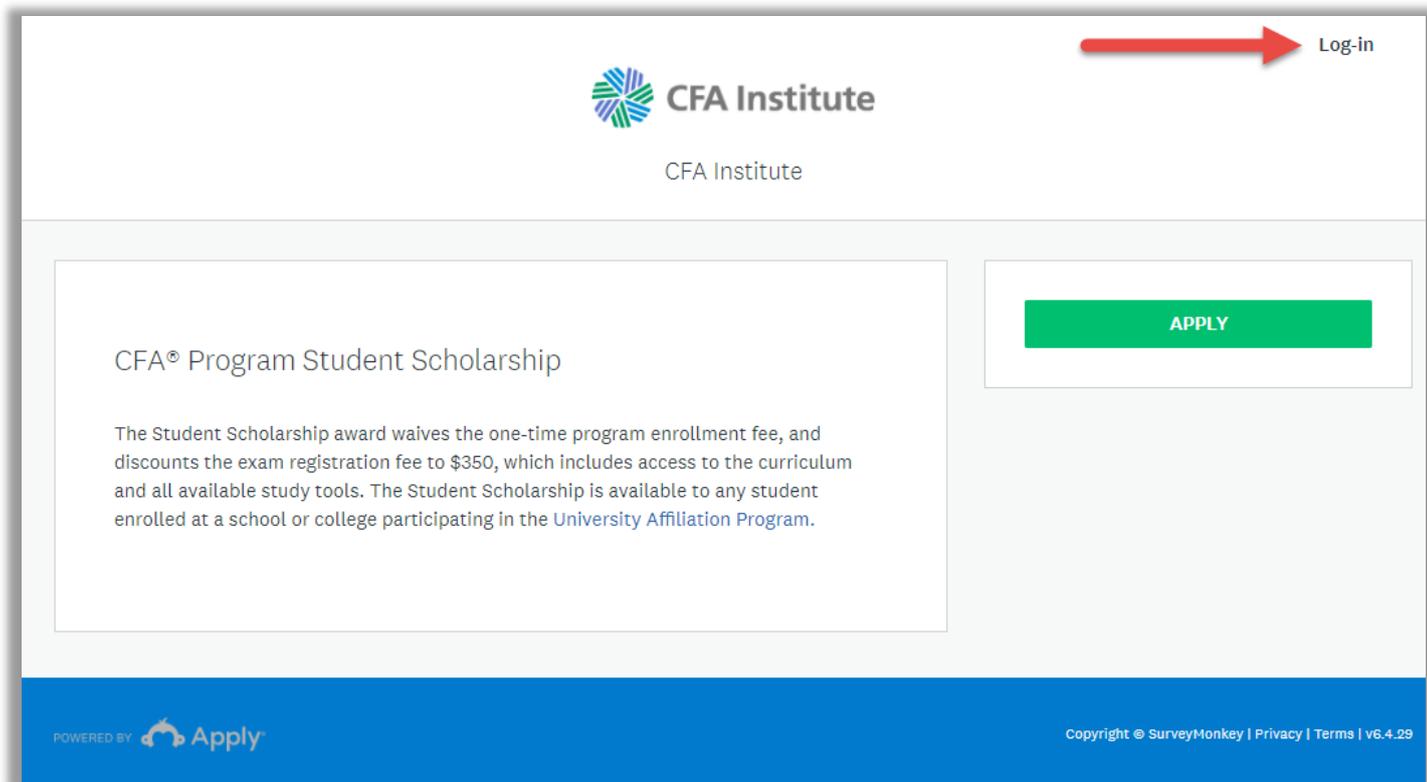
If you are not selected for award…

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 three weeks from the date of your award decision email. 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. Do not submit payment if early exam registration price is not reflected. Please contact our Global Contact Center at **info@cfainstitute.org** or **by phone** for further assistance.

How to apply for the CFA Program Student Scholarship

1. Access the CFA Program Student Scholarship page here: **https://www.cfainstitute.org/en/programs/cfa/scholarships/student** and review the details of the program before continuing.

2. Follow the link to access the CFA Program Student Scholarship application or click here: **https://CFAI.smapply.io/prog/cfa_program_student_scholarship**.

3. Click the 'Log-in' text to log into your CFA Institute account.

4. Log in with your CFA Institute username and password.
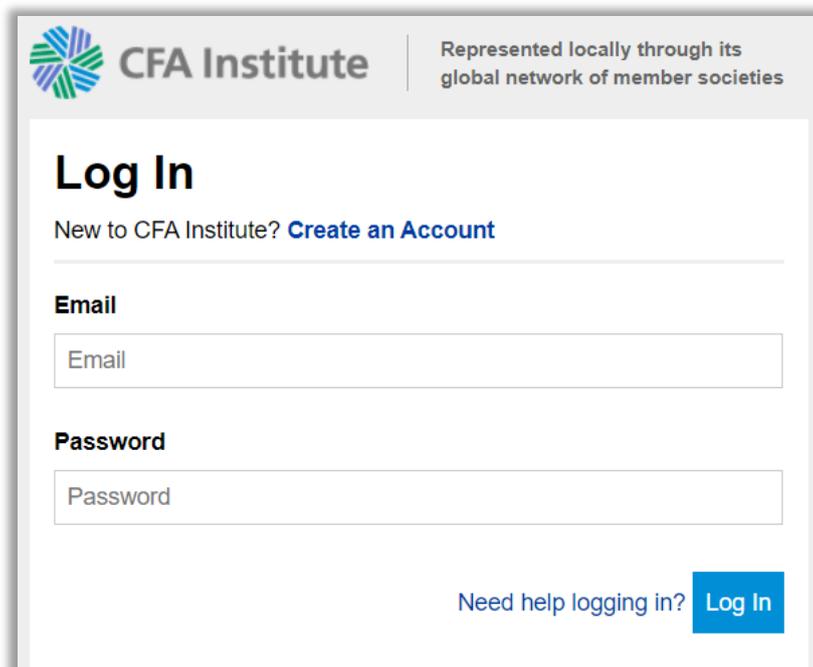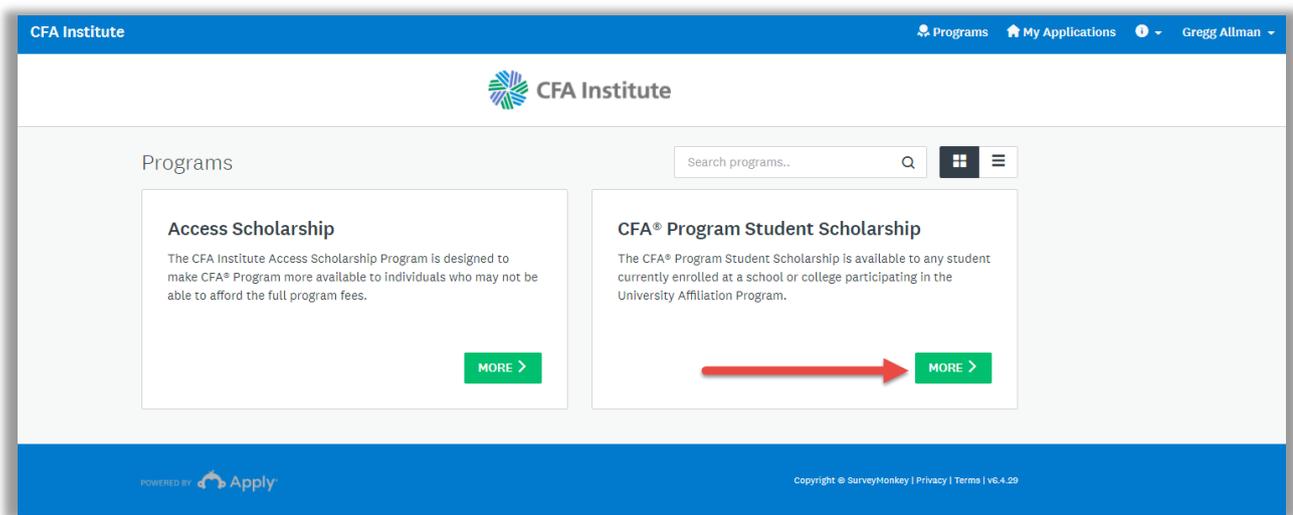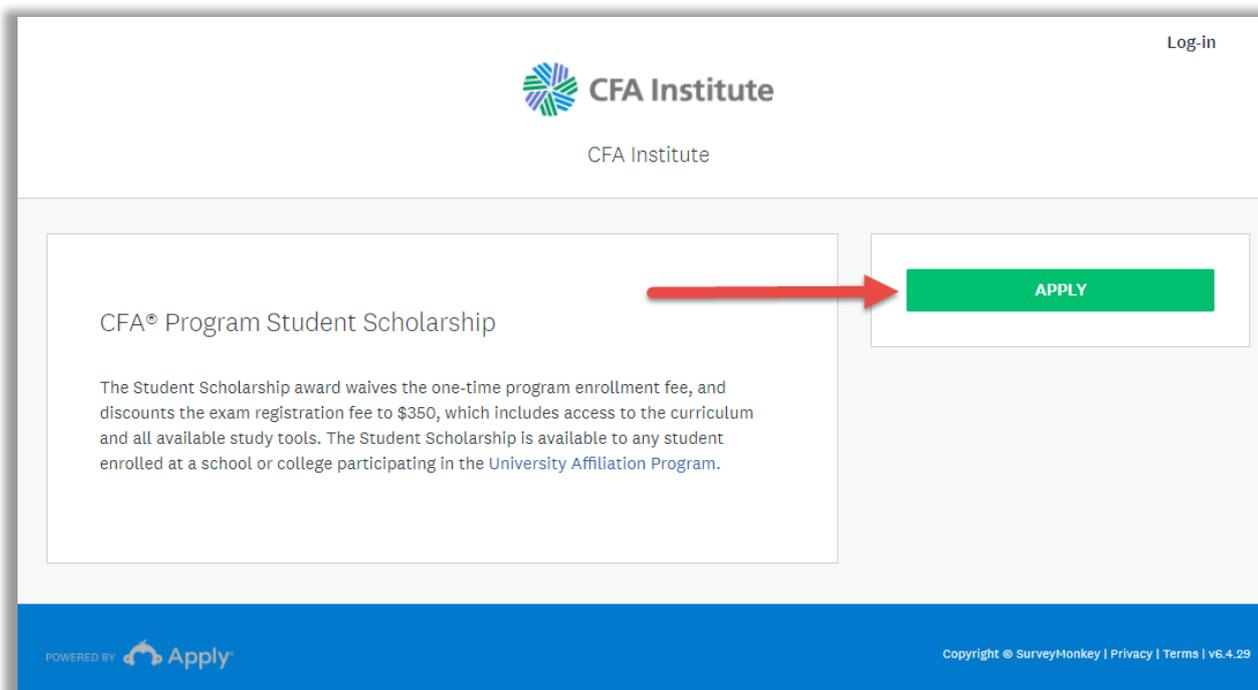
5. Click the green 'View programs' button to see the available scholarship programs.
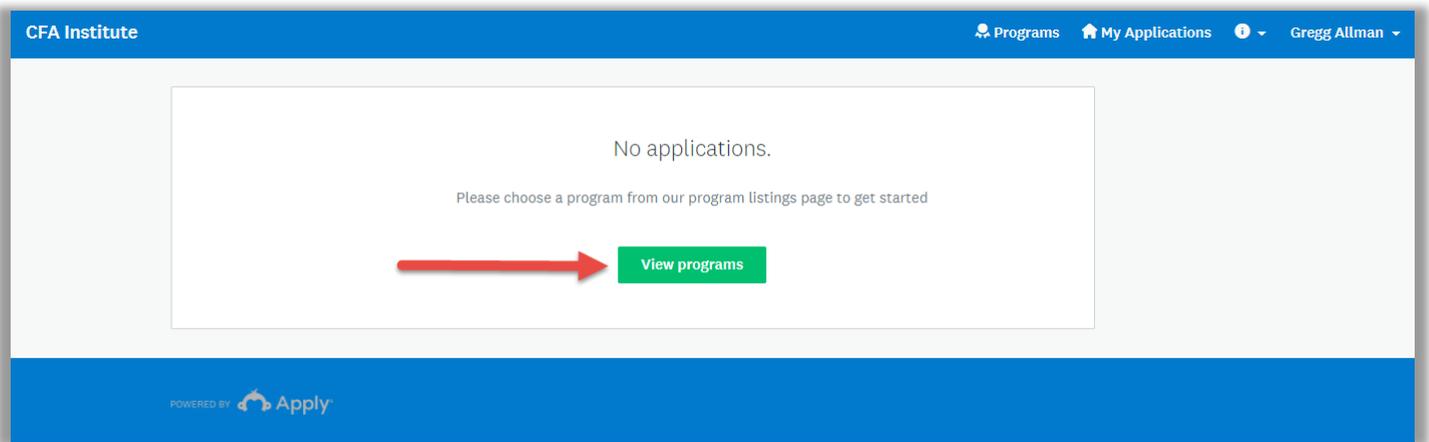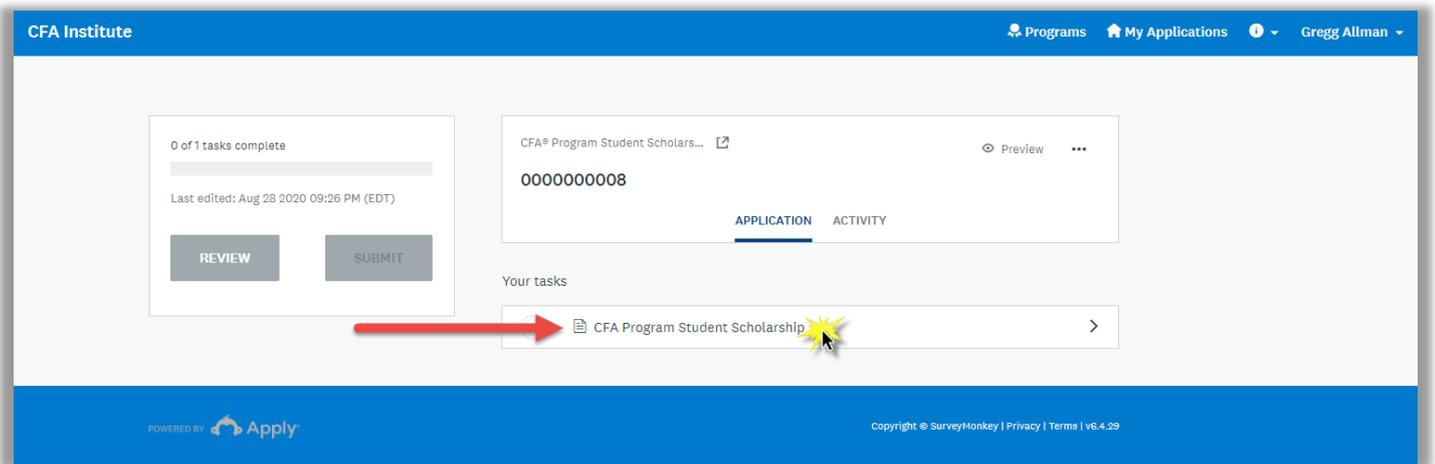

6. Click the green 'More' button
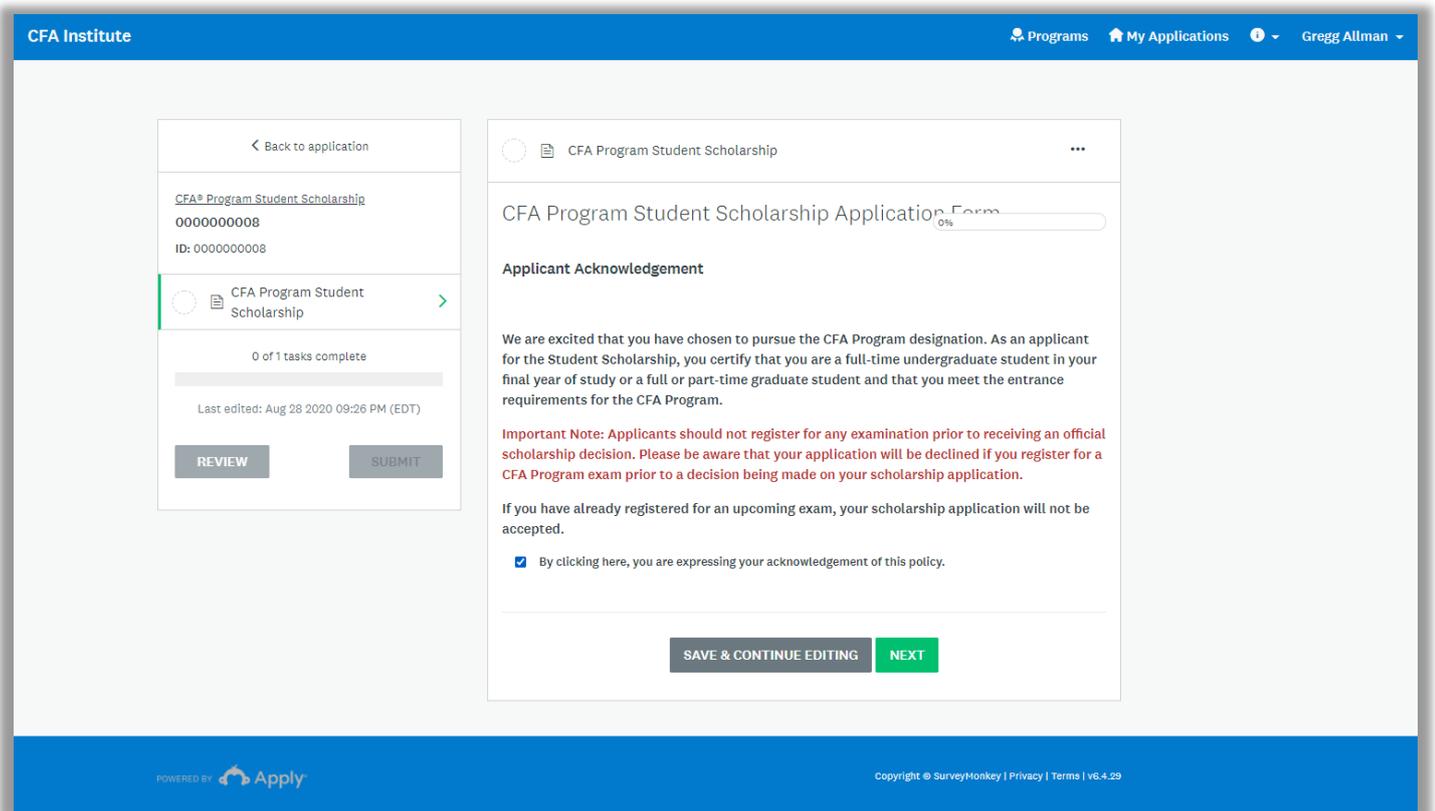

7. Click the green 'Apply' button.

8. Click on 'CFA Program Student Scholarship' to access the application.

9. Each page of the application must be completed in full before proceeding to the next page.

Applicant Acknowledgement Page

Applicant Information Page

Additional Application Requirements & Final Acknowledgement Page

- Some universities require additional documentation as part of a complete scholarship application. Access the CFA Program Student Scholarships Additional Requirements list. If your university is not listed, continue to the Final Acknowledgement section.

10. 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.
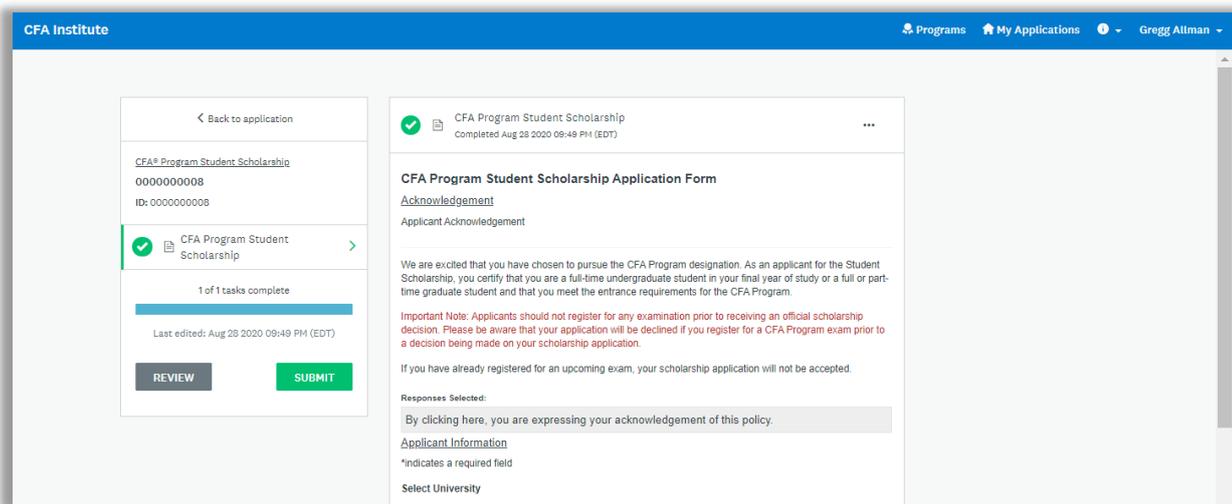
11. If you need to change any of your responses, click on the '…' and select 'Edit.'
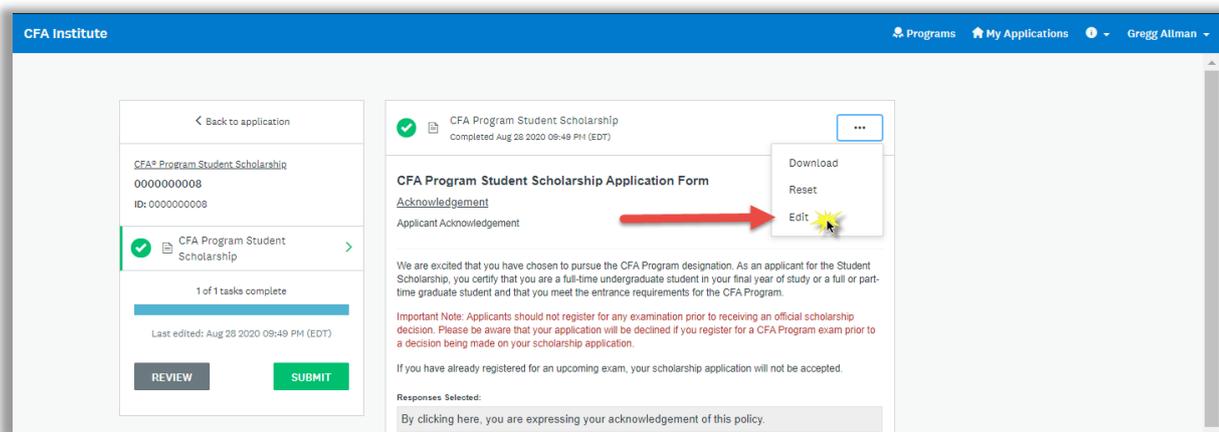
12. Your application will be opened, and you may navigate through each page to make any needed changes. Once you have made the necessary changes click the green 'Mark as Complete' button.
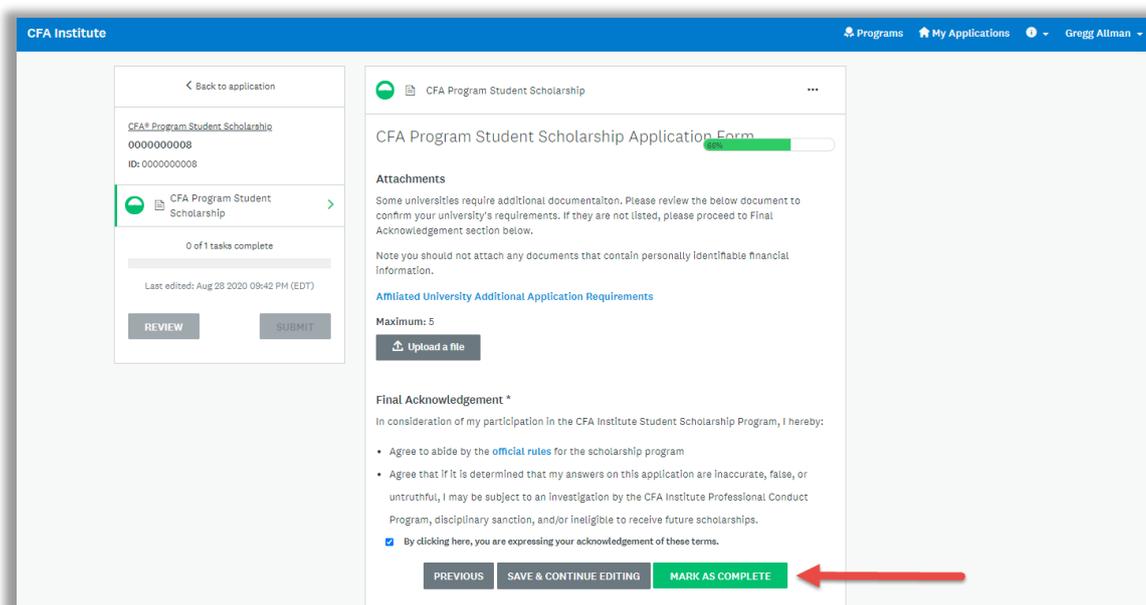
13. When you are ready to submit your application for review, click the green 'Submit' button.
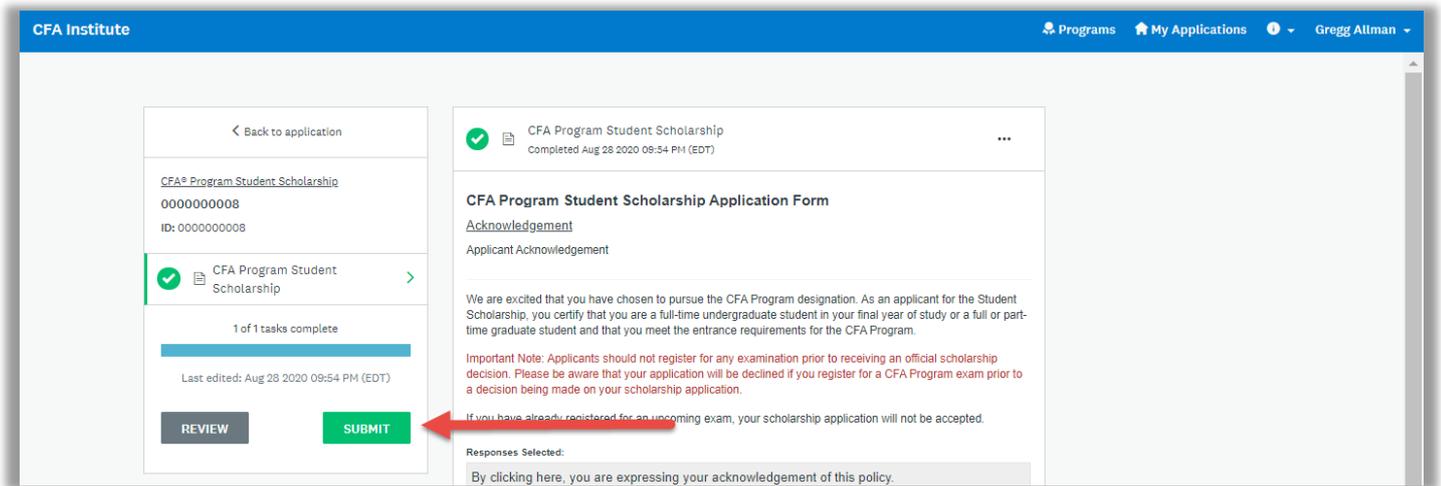
14. You must confirm your submission once more by clicking the green 'Submit' button.
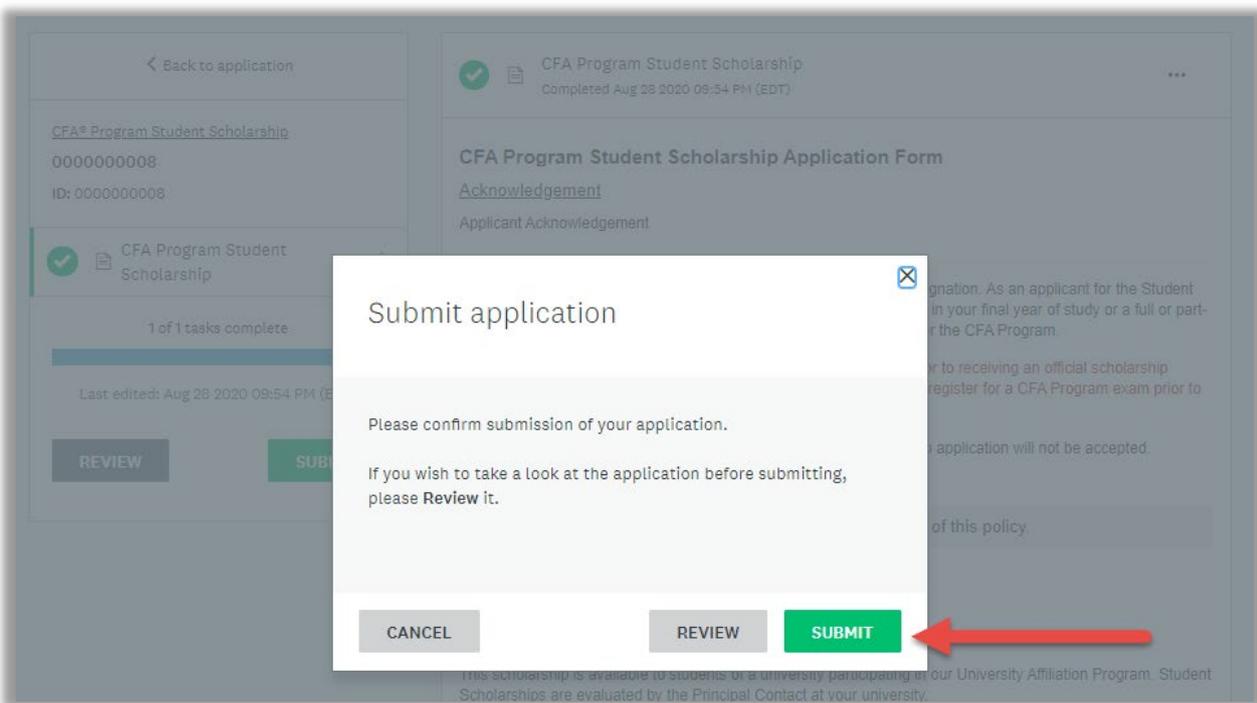
15. You can then navigate back to your application or to the scholarship program overview page. You application has been submitted.
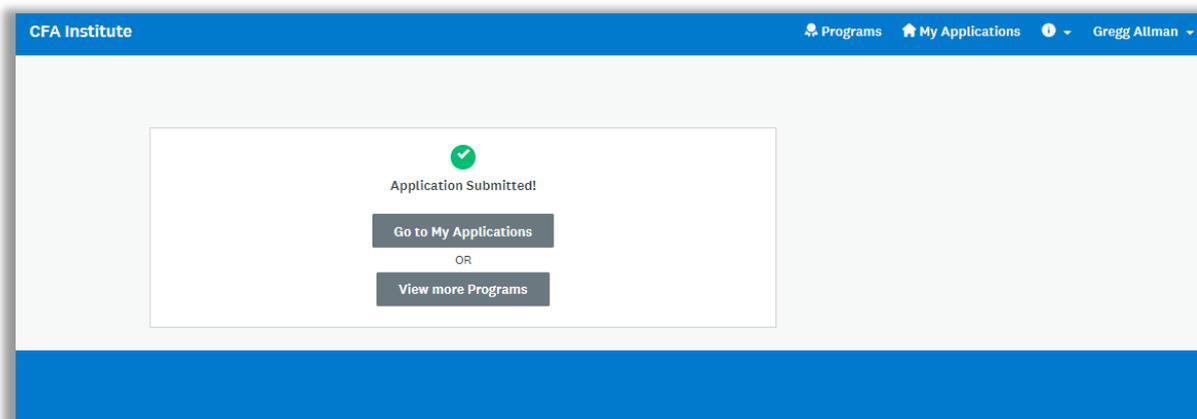
Other Navigation

My Applications

This page allows you to view any page you can see your submitted applications along with the exact date and time you made your submission. Note that you will not see or receive any status updates on your application until the award decision is made by the PC from your university.
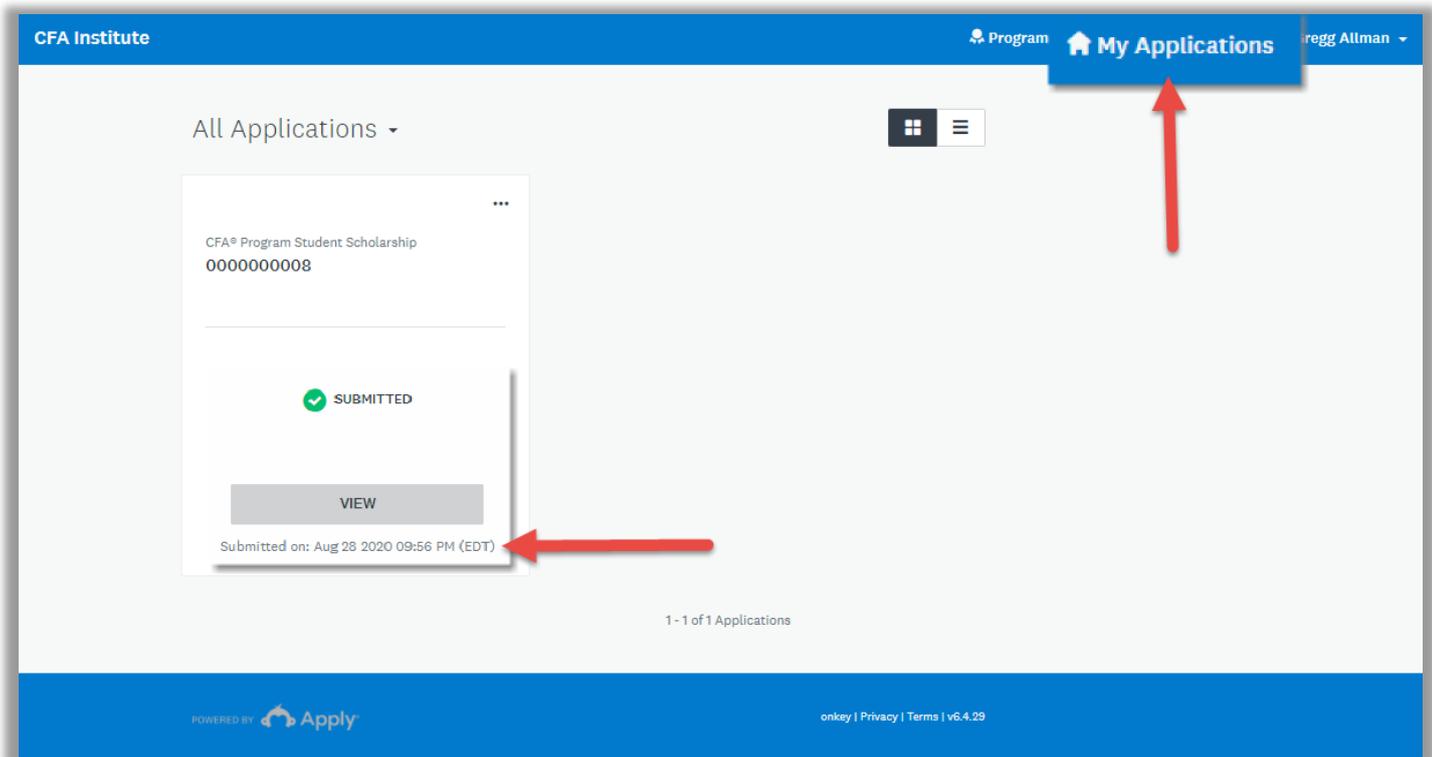
Programs Page

This page contains the complete portfolio of available CFA Program and CIPM® Program scholarships. Click on the green 'More >' button to learn more.
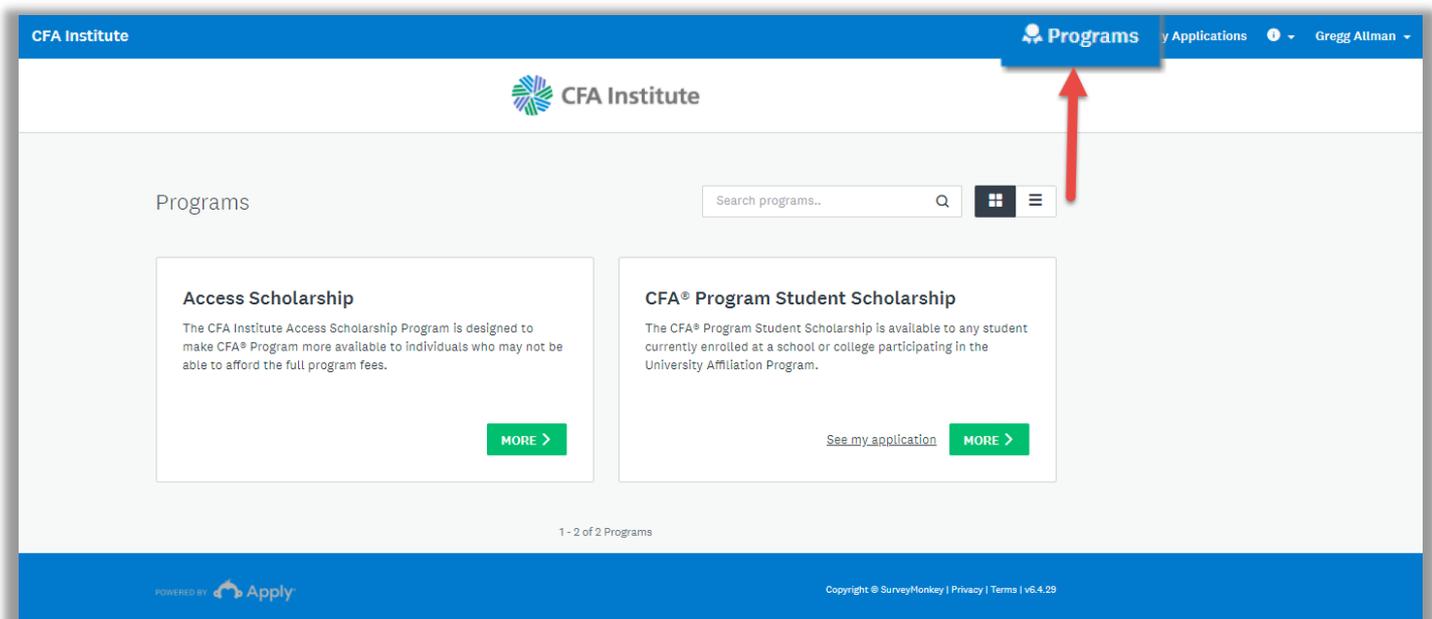
Frequently Asked Questions

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?

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 ensure you are using Google Chrome browser when submitting your CFA Program Student Scholarship. You may need to use an 'Incognito' window if you experience any difficulties. If using an incognito browser does not resolve the issue, please contact the Global Scholarships Administration at **scholarships@cfainstitute.org**.

If you are not able to log in to your CFA Institute account, please **contact our Global Contact Center** for assistance. We suggest you call rather than email for a quicker resolution.

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

While there are technically no deadlines to apply for a CFA Program Student Scholarship, you can use the below table as suggested guidance. It is important to note that once awarded your scholarship can be redeemed for up to one year from the date you receive your award notification email.

Exam	Exam Registration Deadline	Application Submitted
Feb 2021	7 December 2020	before 6 November 2020
May 2021	23 February 2021	before 24 January 2021
August 2021	4 May 2021	before 2 April 2021
November 2021	10 August 2021	before 9 July 2021

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

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

Please email **scholarships@cfainstitute.org** to request your application be withdrawn. Note that this will remove your application completely. You are always welcome to apply for a scholarship again in the future as long as you are not registered for a CFA Program exam.

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/**.
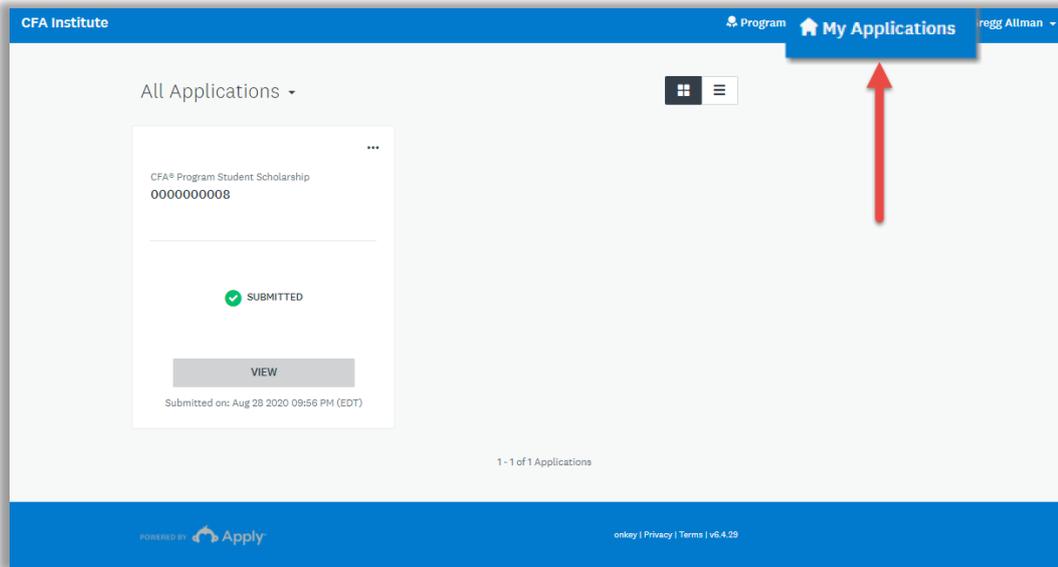
Click on the green 'Continue' button to make any needed changes to your application.
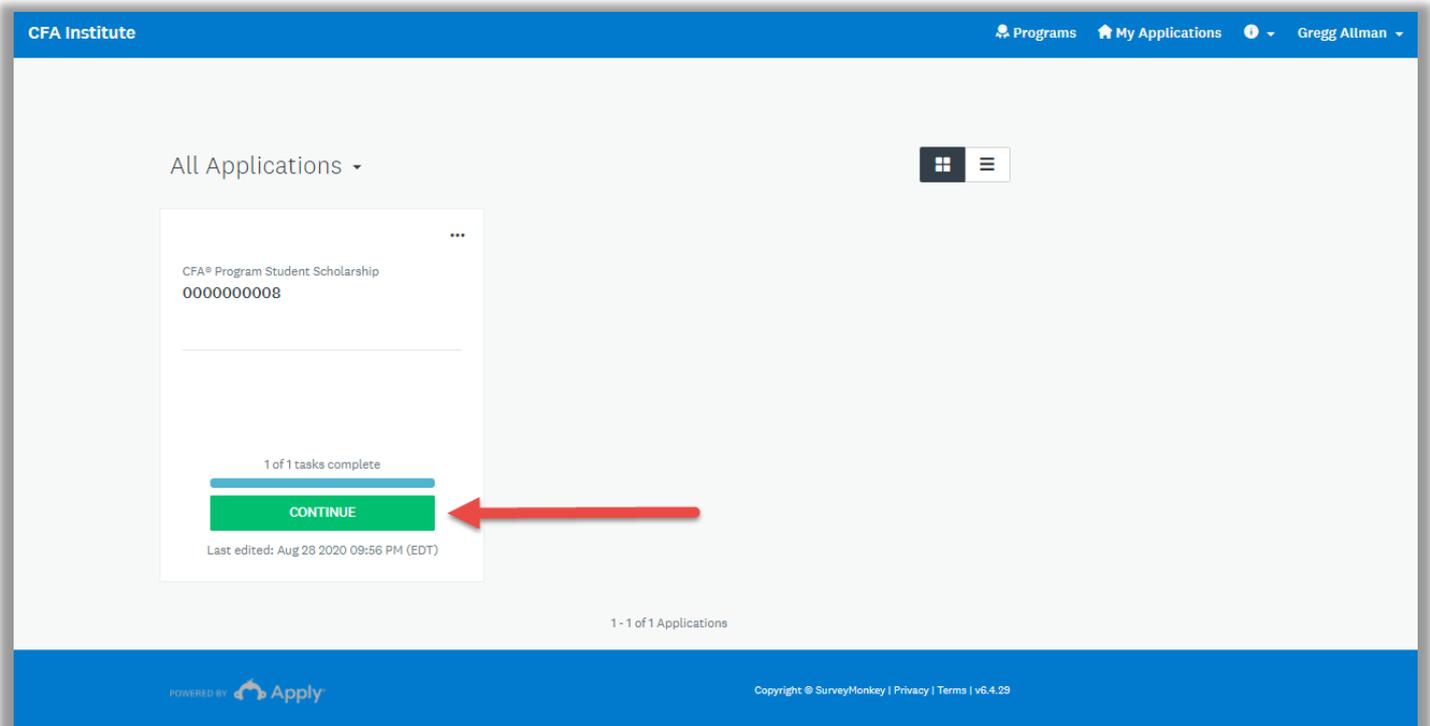
Click on the 'CFA Program Student Scholarship' link to access your application. Once you have made the needed changes, click on the green 'Submit' button.
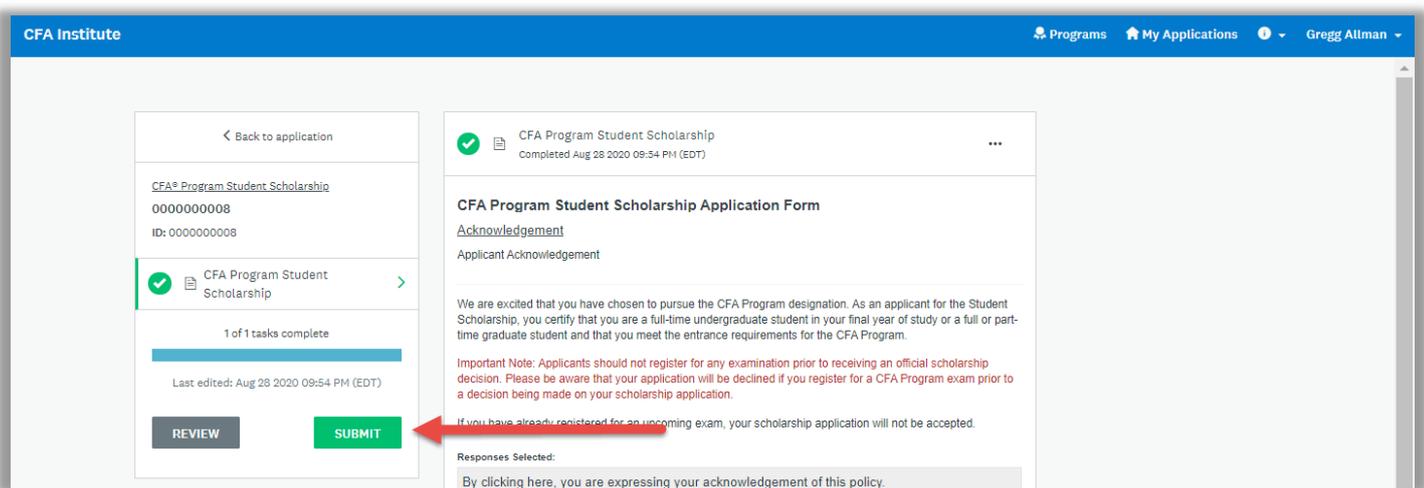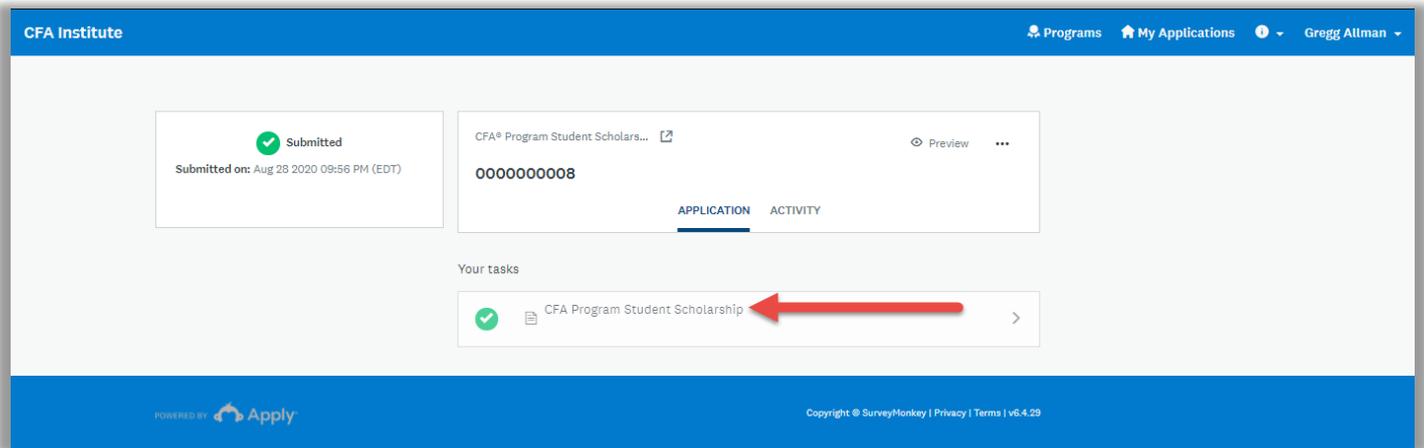
Click the green 'Submit' button to submit your CFA Program Student Scholarship application.
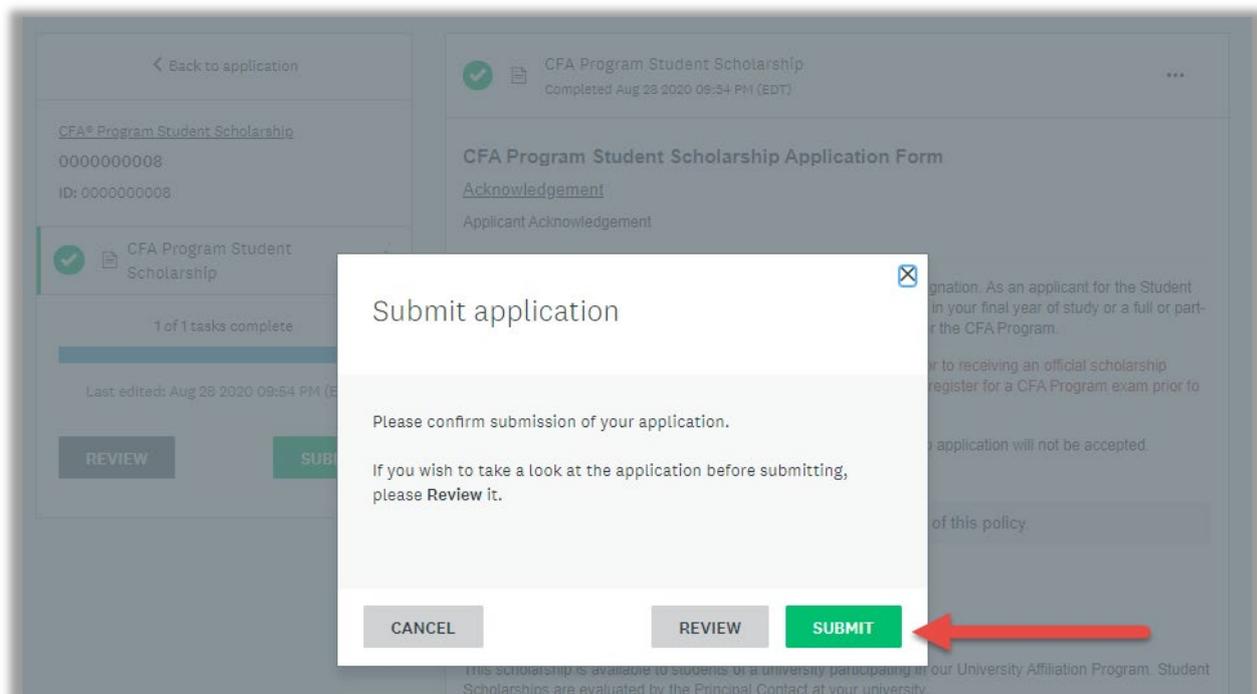
What is the status of my application?
There are no status updates available once you submit your application. Once a decision is made on your application you will be notified immediately via email.

If you are **selected for award** you will receive the below email

CFA Institute

{{ applicant.full_name }},

Congratulations! You have been selected to receive a CFA® Program Student Scholarship.

The 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 during the checkout process.

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. Your award will be available for use approximately three weeks from the date of this email. The discounted price of $350 will be reflected during the exam registration checkout process once your award is available. Do not proceed with registration if that price is not reflected.

Your award will expire one year from the date of this email. 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.

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 the below email

CFA Institute

{{ 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.
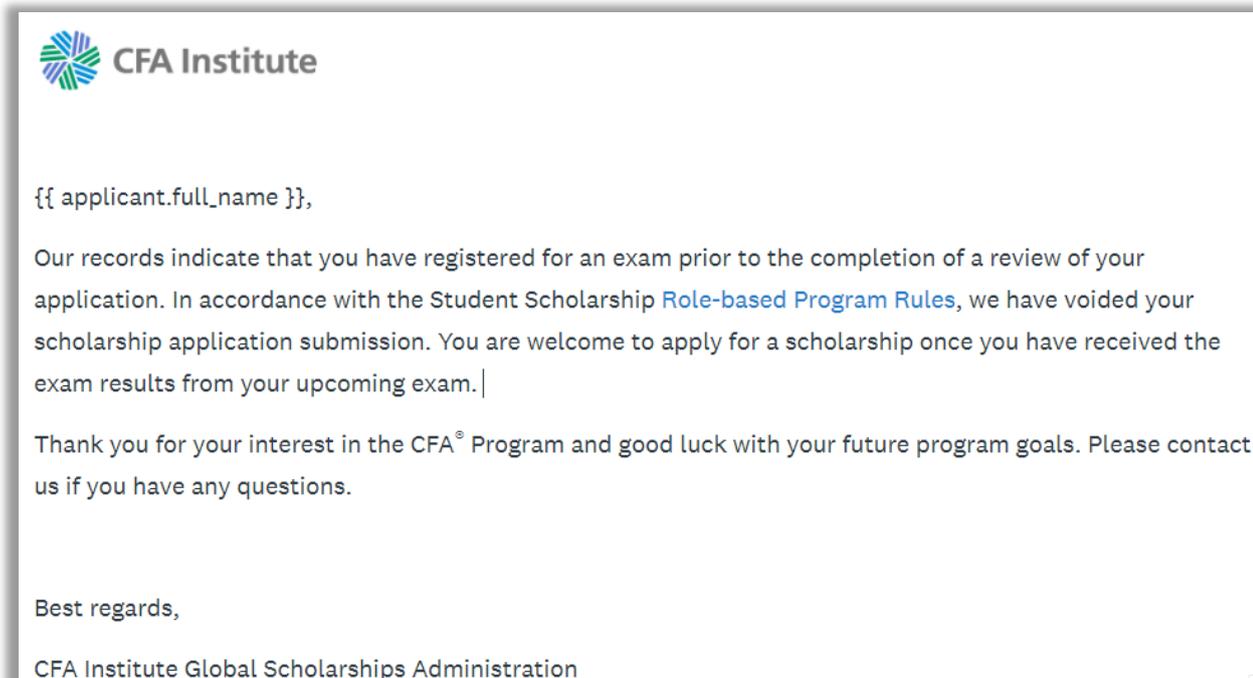
Good luck in your pursuit of the CFA designation. Please contact us if you have any questions or concerns.

Best regards,
CFA Institute Global Scholarships Administration

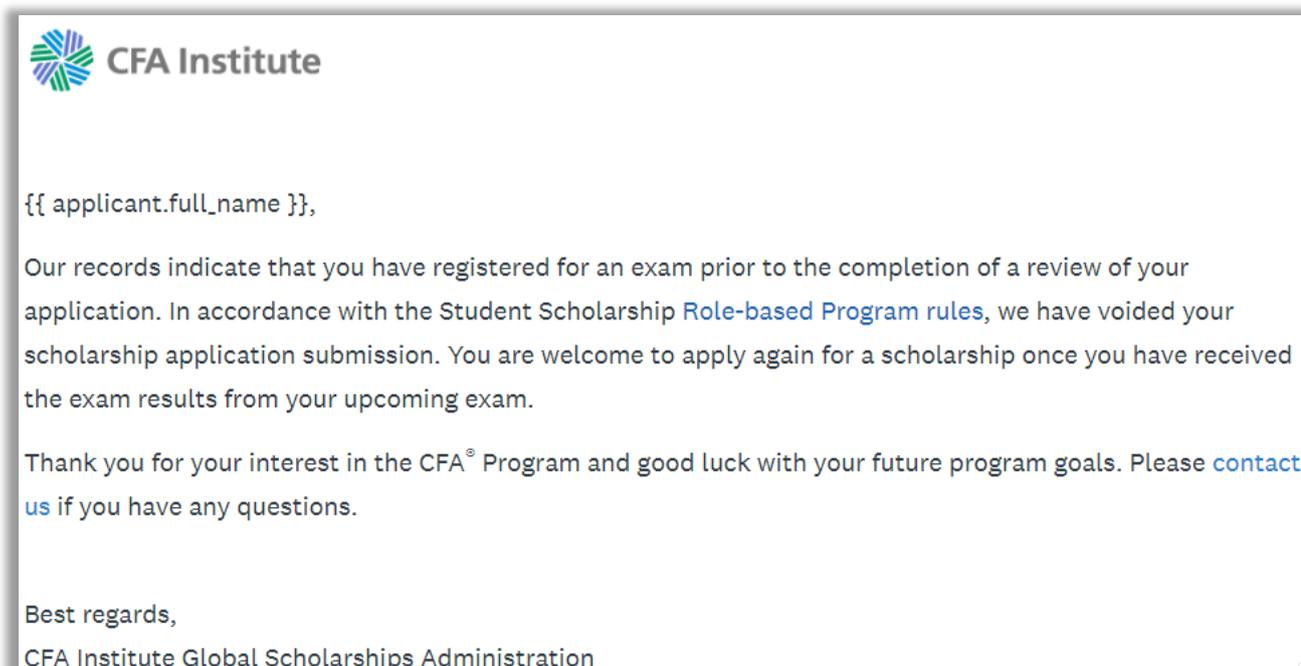**I have completed my exam registration; can I apply for a scholarship?**
No, you are not eligible to apply for or receive a CFA Program scholarship if you are registered for a CFA Program exam. Once you receive your exam results you are welcome to apply for a scholarship for a subsequent exam registration.

If a you are registered and attempt to submit a CFA Program scholarship your application will be denied, and you will receive the below message.

CFA Institute

{{ applicant.full_name }},

Our records indicate that you have registered for an exam prior to the completion of a review of your application. In accordance with the Student Scholarship Role-based Program Rules, we have voided your scholarship application submission. You are welcome to apply for a scholarship once you have received the exam results from your upcoming exam.

Thank you for your interest in the CFA® Program and good luck with your future program goals. Please contact us if you have any questions.

Best regards,

CFA Institute Global Scholarships Administration

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 PC 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.

CFA Institute

{{ applicant.full_name }},

Our records indicate that you have registered for an exam prior to the completion of a review of your application. In accordance with the Student Scholarship Role-based Program rules, we have voided your scholarship application submission. You are welcome to apply again for a scholarship once you have received the exam results from your upcoming exam.

Thank you for your interest in the CFA® Program and good luck with your future program goals. Please contact us if you have any questions.

Best regards,
CFA Institute Global Scholarships Administration

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 at **info@cfainstitute.org** or **by phone** for immediate assistance.