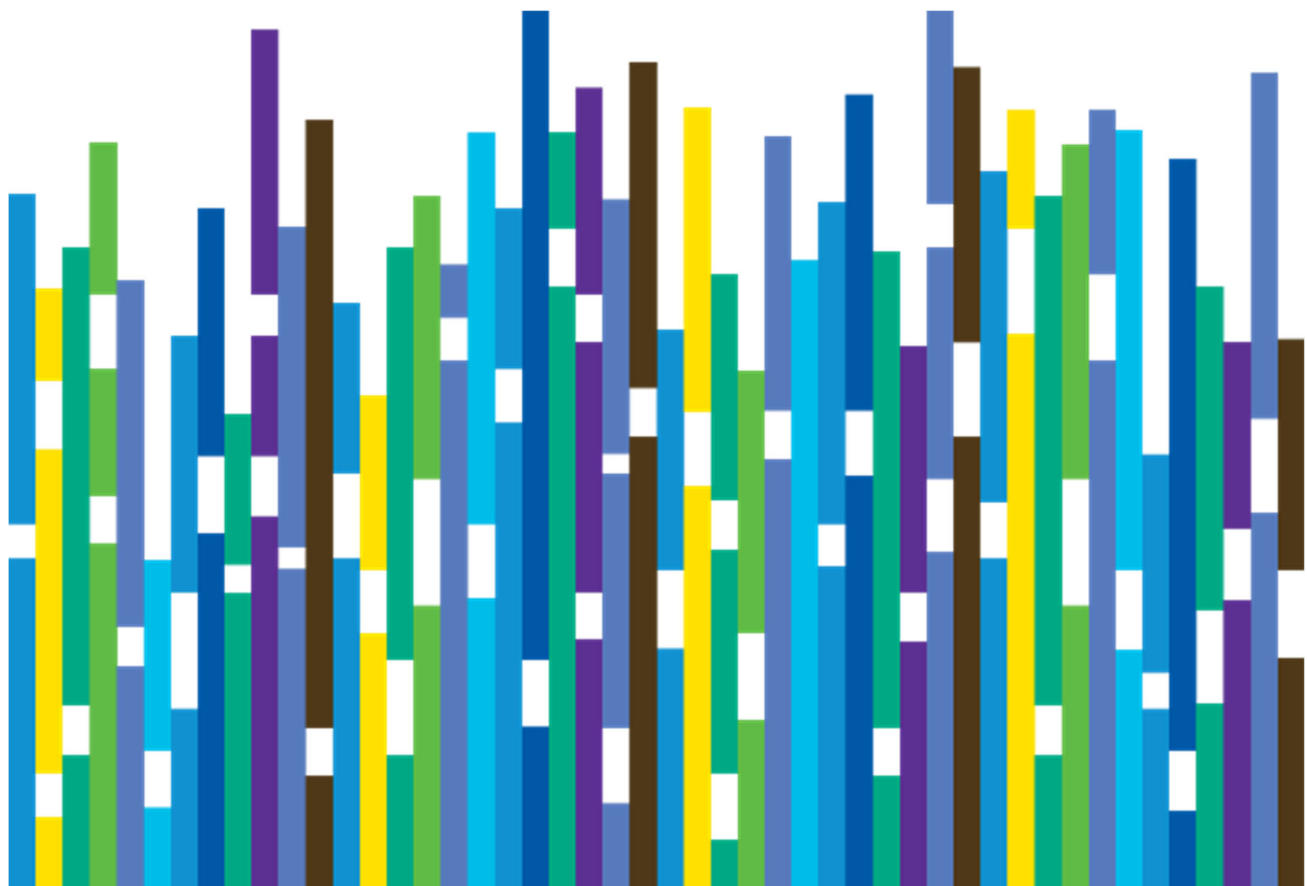


# UNIVERSITY AFFILIATION PROGRAM: GUIDE TO CFA<sup>®</sup> PROGRAM STUDENT SCHOLARSHIPS FOR PRINCIPAL CONTACTS

Best Practices for Affiliated Universities

v.FY20



# UNIVERSITY AFFILIATION PROGRAM: PRINCIPAL CONTACT 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 that you can distribute to students as you see fit. The allotment that is granted to your university is the total number of scholarships that you can award for that fiscal year, which encompasses the December exam of one year and June exam of the following year.

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 they submit a scholarship application at any time during the application window but are not selected for a scholarship, they will still receive the early registration price.

## Accessing the Scholarship Applications:

**PLEASE NOTE: All scholarship application selections must be made online by the Principal Contact.**

Principal Contact Scholarship Platform Link (to review and select):

<https://scholarshippreview.cfainstitute.org/UniversityPOC/Home>

\*Note: access to the Scholarship Platform is granted to Principal Contacts by means of their account on CFAInstitute.org and its associated email/password, but the Scholarships Platform must be logged into separately from the main CFA Institute website.

To request a CFA Institute account, see page 4 of this document for instructions.

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. We encourage you to monitor the Scholarships Platform frequently.

Also note: the application is accessible through a public link. Any student at the Affiliated school can access the application and apply.

## 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](mailto:university@cfainstitute.org) with any questions or concerns you may have.

## How are scholarship allotments determined?

Each university participating in the University Affiliation Program automatically receives a base allotment of three (3) CFA Program student scholarships per fiscal year. Additional scholarships are awarded as detailed in the table below:

Criteria	Scholarships Awarded	Limit
<b>Base allotment</b>	3 scholarships	Granted to all universities participating in the University Affiliation Program
<b>Each additional degree program mapped to the CFA Program curriculum</b>	+1 scholarship for each additional affiliated program	Not capped
<b>Recognition of the CFA Program as an admission criteria</b> (i.e., GMAT waiver or recognizing completion of CFA Program Level III as bachelor's degree in relevant discipline) This recognition must be stated on your university's website to qualify.	+1 scholarship	Capped at one (1)
<b>Recognition of the CFA Program granting a course waiver</b> (i.e., offering course credit or exemption for completion of any CFA Program exam) This recognition must be stated on your university's website to qualify.	+1 scholarship	Capped at one (1)
<b>Offering a credit-earning stand-alone ethics course</b> (must feature the <a href="#">CFA Institute Standards of Practice Handbook</a> )	+3 scholarships	Capped at three (3)
<b>Participation in the Professor Scholarship program</b>	+1 scholarship	Capped at one (1)
<b>Affiliated degree program contains a course that requires students to sit for a CFA Program exam</b>	+1 scholarship	Capped at one (1)
<b>Full-time* faculty who are CFA charterholders (including dean, course director, or administrator) who teach a course that is part of affiliated degree program</b>	+3 scholarships	Not capped
<b>Part-time** faculty who are CFA charterholders (including dean, course director, or administrator) who teaches a course that is part of affiliated degree program</b>	+1 scholarship	Not capped

\* *Full-time* is defined as teaching at least six (6) credit hours per quarter or semester (or equivalent) or an administrator teaching a minimum of three (3) credit hours per quarter or semester (or equivalent).

\*\* *Part-time* is defined as teaching at least three (3) credit hours per quarter or semester (or equivalent) at one college or university.

## Frequently Asked Questions for Principal Contacts:

### What is my university's scholarship allotment?

All universities who are part of the University Affiliation Program begin with a base allotment of three (3) scholarships. Additional scholarships are allotted based on a school's responses to the Annual Review (or UAP application responses within the first fiscal year of Affiliation), increasing per the table on page 3 of this guide.

Each year, following your submission of the Annual Review, we will notify you of your scholarship allotment for the next fiscal year. If you have any questions about your allotment, or would like to double check your allotment number for the current fiscal year, please email [university@cfainstitute.org](mailto:university@cfainstitute.org).

### Who can award scholarships?

As the Principal Contact (PC) of the affiliated university, you and your designates (see below) have complete control of scholarship awards through the Scholarships Platform.

### Can someone other than the PC review and approve scholarship applications?

Yes. As Principal Contact, you may grant access to the Scholarships Platform to another individual by sending an email to [university@cfainstitute.org](mailto:university@cfainstitute.org) and copying in the individual(s) to whom you wish to give access. Anyone granted access to the Scholarships Platform will be able to review, approve, or reject a submitted application with the same authority as the PC. That is, all individuals who are granted access have the same level of control and can override each others' selections.

If you need to update access for any individual you have granted access to please email [university@cfainstitute.org](mailto:university@cfainstitute.org) with that request.

### How do I access the Scholarship Platform to review submitted applications?

If you are a Principal Contact with an account at CFAInstitute.org, you can access the Scholarships Platform using the same email/password combination at <https://scholarshippreview.cfainstitute.org/UniversityPOC/Home>.

The Scholarships Platform must be logged into separately from the main CFA Institute website.

If you are a Principal Contact and do not have an account on CFAInstitute.org, please follow [these instructions](#) to create an account. Then, send your CFA Institute ID number to [university@cfainstitute.org](mailto:university@cfainstitute.org) to request access. Access is usually granted within 5 business days.

### Are scholarships transferrable?

No. Once a student is selected, the scholarship may not be transferred to another student nor may it be applied to a future exam offering. It is important to speak with each student to let them know this so that your allotted scholarships do not go unused. Any unused scholarships will be forfeit and will not carry over to the next fiscal year.

### Can I view applications or student lists from past years' submissions?

No. Once the deadline for awarding scholarships has passed for a particular exam, the scholarship applications related to that exam are removed from the platform. Therefore, only scholarship applications for the current exam will display on the platform.

## Frequently Asked Questions continued:

### 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, as the “owner” of the Affiliated program, the Principal Contact has sole discretion in awarding scholarships.

If you would like to require that students submit documents such as transcripts, essays, etc. in support of their application, and wish those to be uploaded to the Scholarship Platform, you are responsible for making applicants aware of such requirements. The Scholarships Platform cannot be customized for each university.

### Should my students 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 their access to the scholarship application. If a student erroneously registers before applying for a scholarship, please email [university@cfainstitute.org](mailto:university@cfainstitute.org) for next steps. Students will, however, need to register after they are notified of their application's outcome, and will receive notice of next steps at that point.

### The early registration deadline is approaching, but scholarship decisions have not been made. Should students register in case they 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 they submit a scholarship application at any time during the application window but are not selected for a scholarship, they will still receive the early registration price.

### What if my students want to get a head start on their studies?

If students are interested in receiving the curriculum books to start studying prior to being notified of their scholarship outcome, they can purchase the CFA print curriculum through select online booksellers. Please be aware that students will not receive a refund or credit for the value of their purchases either before or after registration. For more information, please feel free to share the following link with your students who are interested: <https://www.cfainstitute.org/en/programs/cfa/curriculum/print-version>.

### What happens when a student submits an application?

A scholarship application confirmation email will be sent to the student upon submission of their application informing them that CFA Institute has successfully received their application.

Note: there is no automatic notification sent to you, the PC, when a scholarship application is submitted. We encourage you to monitor the Scholarships Platform frequently.

## What should your scholarship recipients be aware of?

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

## Once awarded, how do students know when and how to register?

Once you have selected a student to receive a scholarship, that student will be notified via email within 2-3 weeks of selection that they received the award. Below is the text of the scholarship award email that your students 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 students who are not awarded scholarships receive?

Below is the text of the email that your 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,*

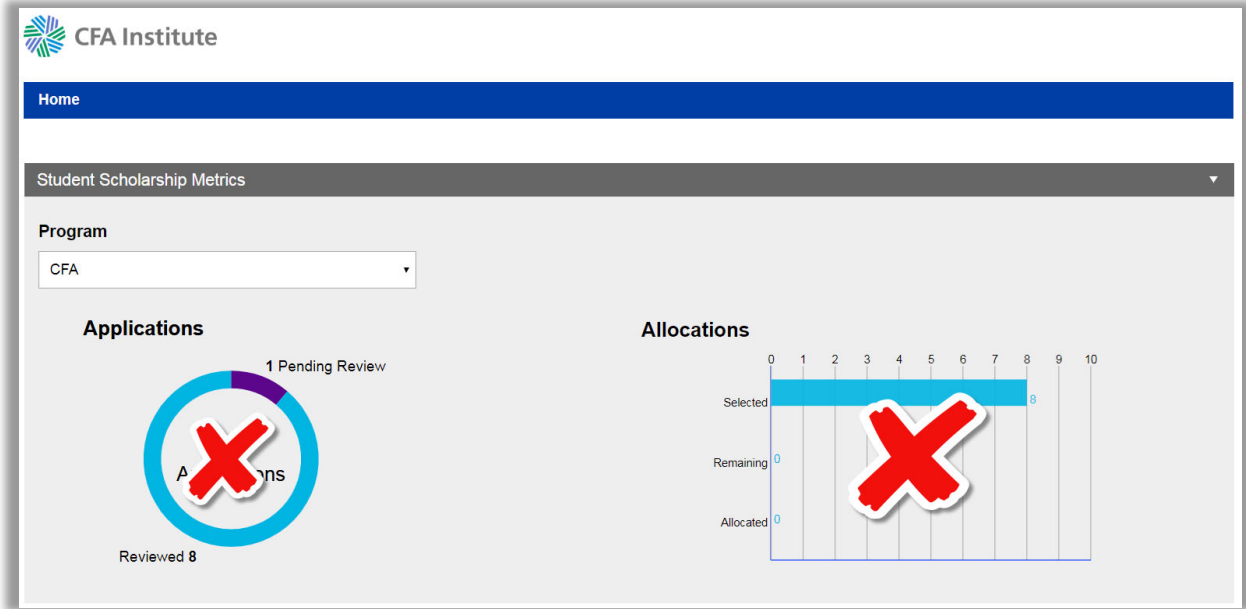
*CFA Institute Global Scholarships Administration*

# SCHOLARSHIPS PLATFORM – PC VIEW

The Scholarships Platform landing page displays two charts:

- Applications Donut chart
- Allocations Bar chart

At present, **these charts display inaccurate information and should be disregarded.**



Below the graphs is the List of Applications, which displays basic tracking information for each student’s scholarship application. Each application can be viewed by clicking on the student’s CFA Institute ID number, which is in the first column of the list.

List of Applications

Name:  Status:

Program:

CFA Institute ID	First Name	Last Name	Submitted on	Status	Program
<a href="#">[ID]</a>	[Name]	[Name]	26-Jan-2019	Reviewing	CFA
<a href="#">[ID]</a>	[Name]	[Name]	29-Aug-2018	Selected for Award	CFA
<a href="#">[ID]</a>	[Name]	[Name]	17-Aug-2018	Selected for Award	CFA
<a href="#">[ID]</a>	[Name]	[Name]	15-Aug-2018	Selected for Award	CFA
<a href="#">[ID]</a>	[Name]	[Name]	30-Aug-2018	Selected for Award	CFA
<a href="#">[ID]</a>	[Name]	[Name]	12-Sep-2018	Selected for Award	CFA

The application displays the student's answers/submitted details, as well as the Acknowledgment to which the student must agree in order to submit their application:

[Home](#) / [View Application](#)

## CFA® Program University Student Scholarship Application

Exam Selected: June 2019    Application Deadline : 02 February 2019

**Level II**  
June 2019

**Applicant Information**

<b>CFA Institute ID:</b>	██████████	<b>Name of the College/University:</b>	████████████████████
<b>Email Address:</b>	████████████████████	<b>College/University Website URL:</b>	████████████████████
<b>Given name:</b>	██████████	<b>Education:</b>	██████████
<b>Surname:</b>	██████████	<b>Year of Study:</b>	██████████
<b>Suffix:</b>	██████████		
<b>Date of Birth:</b>	██████/███/███		
<b>Gender:</b>	██████████		
<b>Phone Number:</b>	██████-██████-██████		

**Scholarship Referral \***  
How did you learn about Student Scholarships?

### Acknowledgement

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.

██████████  
26-January-2019



The Principal Contact information will be populated in the fields below. If any of the information is incorrect please contact us immediately with details. You must agree to the statement in the 'University Acknowledgement' section.

**University Information**

Program Director or Principal Contact : [REDACTED]

Name of College/University: [REDACTED]

E-Mail Address: [REDACTED]

Primary Phone Number: [REDACTED]

**University Acknowledgement**

I certify that I am the authorized Principal Contact for my university as part of the University Affiliation Program.

I agree to the statement above.

[REDACTED]

05-March-2019

Once you have reviewed the application you can make your decision final by using the 'Application Decision' drop down menu.

- Select for Award – means that you would like to award this student a CFA Program student scholarship.
- Not Selected for Award – means that you do not want to award the student a CFA Program student scholarship.
- Select Decision – if you do not select one of the other two options, the application remains “under review”. Note that students whose applications are left “under review” will ultimately be considered as “Not Selected for Award” if no decision is selected.

Finally, click either 'Save' to return to your home page or 'Save and Proceed to next application' to continue reviewing submitted applications.

**Application Decision**

Selected for Award ▼

Select Decision

Selected for Award

Not Selected for Award

[Back to Home](#) | [Previous Application](#)

# SCHOLARSHIPS PLATFORM – STUDENT VIEW

## 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 - December 2019

Application deadline:  
02 Sep 2019

### 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**

**Date of Birth \***

**Day \***

**Month \***

**Year \***

**Gender \***

Female

Male

Prefer Not to Answer

**Phone \***

**Country / Region code \***

**Phone Number (add numerical digits only)\***

**Name of College / University \***

**College / University website URL \***

**Education \***

Undergraduate  Graduate

**Current year of study \***

**Scholarship Referral \***

How did you learn about Student

Scholarships?

**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

Upload

**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.**

**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](http://www.cfainstitute.org/contactus).  
[Contact us](#) to purchase the eBook curriculum in advance of registration.

Save for Later

Save and Submit