



# NEW PLANNER RECRUITING

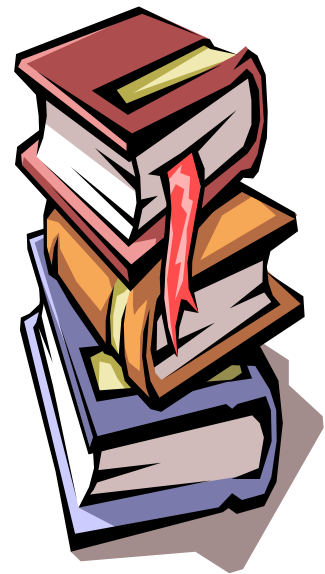
## CFP® Certification Exam Fee Scholarship Program

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### Overview and Mission

New Planner Recruiting, LLC is committed to the next generation of financial planners and encourages all aspiring planners to pursue the CFP® certification so they will be positioned for long term career success in the financial planning profession. To facilitate this, we are offering three scholarships beginning in 2014 to cover the exam fee portion of the certification process for students in a CFP Board Registered Degree Program.

Each of the winners will receive reimbursement for what it cost them to take the CFP® certification examination. All awards will be paid in arrears once all criteria have been met including passing the exam. No partial awards will be granted. The decisions to award these scholarships shall be made at the full discretion of the New Planner Recruiting, LLC Scholarship Program Selection Committee. All applicants are responsible for reading, understanding and abiding by all of the guidelines.



### Eligibility

To be eligible for any scholarship award, all of the following qualifications must be met:

1. Currently enrolled in or recently graduated from a CFP Board registered financial planning degree (certificate program students are not eligible at this time) program. The “target audience” includes candidates who have graduated, or expect to graduate, between December 2017 and August 2019 inclusive. To verify a program is registered, visit the CFP Board web site: <http://www.cfp-board.org/>.

2. Intention to take all required courses for the CFP Board's certification examination and fulfill all requirements to become a CFP® licensee. A comprehensive CFP® exam review course is also suggested.
3. Complete and submit a truthful, timely and complete application package. The application package includes:
  - Application form demonstrating academic and personal accomplishments (i.e. grades and degrees received, professional and community involvement, ambitions, etc.).
  - Proof of academic record such as an original transcript (or equivalent) from your institution.
  - Two letters of recommendation from either professors or CFP® professionals in good standing. We prefer to have these letters on original letterhead, accompanying your application and transcript; however, e-mail format is acceptable as long as the Selection Committee can reasonably confirm its validity (e.g. include author's phone contact information).
4. Pass the CFP® certification examination anytime before December 31 of the year following the year of award and submit proof to the New Planner Recruiting, LLC Scholarship Program Committee (e.g. 2018 award recipients must pass before Dec. 31, 2019, to receive their scholarship payment).

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## **Requirements and Process**

1. Complete application packages must be postmarked on or before:

**April 30th, 2018**

2. The Selection Committee is not obligated to consider partially completed application packages. Application documents postmarked after the deadline date above will be considered incomplete. E-mails received after April 30th or later are likewise late.

Send to:

**Scholarship Committee**

Attn: Caleb Brown, MBA, CFP®

1860 Barnett Shoals Dr Suite 103 PMB 445

Athens, GA 30605

Email: [cbrown@newplannerrecruiting.com](mailto:cbrown@newplannerrecruiting.com)

***NOTE: These are all merit-based scholarships. Financial need is not a consideration. Limit one scholarship per individual. Recipients will receive their due award upon fulfillment of stated requirements.***

*Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.*



# NEW PLANNER RECRUITING

# Scholarship

## Application

## Program

You may type or write *legibly* to complete this application, **BUT PLEASE DON'T ALTER THE FORMAT.**

Name:	Last 4 SSN (to verify transcript):
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*CURRENT*

PERMANENT (if different from Current)

Address, City, State & ZIP:	Address, City, State & ZIP:
Phone: (please list at least one)	Phone: (please list at least one)
W _____	W _____
H _____	H _____
C _____	C _____

Email Address:
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**CFP Board-Registered Program** in which you are currently enrolled or recently graduated (not prior

to Dec. 2016): \_\_\_\_\_

Type of degree/certificate: \_\_\_\_\_

**CFP® Program Course Work** (for GPA, assume a four point scale; please note if otherwise)

Cumulative GPA: All courses \_\_\_\_\_ Core financial planning courses \_\_\_\_\_

**\* Be sure to also submit a current, original transcript.**

Please list the required financial planning courses you have not yet taken (if applicable):

_____	_____
_____	_____
_____	_____

When are you planning to take the CFP® Certification Examination? Mo/Yr \_\_\_\_\_

Are you planning to take a comprehensive review course before the exam?

Y N If yes, please indicate which one (if known): \_\_\_\_\_

<b>Academic Background:</b> Other than the answers provided above, have you earned any additional degrees?			
Institution	Degree or Certificate	Year	GPA

**Current & Previous Employment:** Please list your employment history for the past five years, starting with the most recent.

Employer	Dates	Street/City/State	Position/Responsibilities

**Professional Achievement:** Please list any professional achievements for the past five years, starting with the most recent.

Type of Award/Honor	Year	Name of Organization


<p><b>Community Service:</b> Please list any community service activities for the past five years, describing the nature of your involvement.</p>		
Type of Community Service	Year	Nature of Involvement

**Short Essay:** Please answer the following questions in your own words.

1 Why have you chosen the financial planning profession?

2 What do you feel are the benefits of obtaining the CFP® designation?

3 What are your career goals beyond becoming a CFP® certificant?

4 Describe where you see yourself professionally five years from now.



5 How do you plan to achieve the professional aspirations you have indicated?

6 If you were President of the Financial Planning Association in 2018, how you would you guide the organization in its mission of advancing the financial planning profession?

Do you have any additional comments we should consider with your application?

***\* Be sure to also submit two letters of recommendation from professors and/or CFP® professionals.***

By my signature below, I agree that the information submitted herein is complete, truthful and accurate, to the best of my knowledge. I have read, understand and will comply with all Guidelines for this Scholarship Program. I further understand that New Planner Recruiting, LLC will not be liable for paying an awarded scholarship, in whole or in part, if I fail to fulfill my responsibilities within the prescribed time frame. Additionally, I do intend to become an involved member of this profession as I recognize the importance and value of actively contributing to the advancement of my profession.

<b>Signature of Applicant:</b>	<b>Date:</b>
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*\* By submitting this application, you also agree to receive periodic emails from New Planner Recruiting to provide updates on the latest nationwide job opportunities for new planners.*

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