

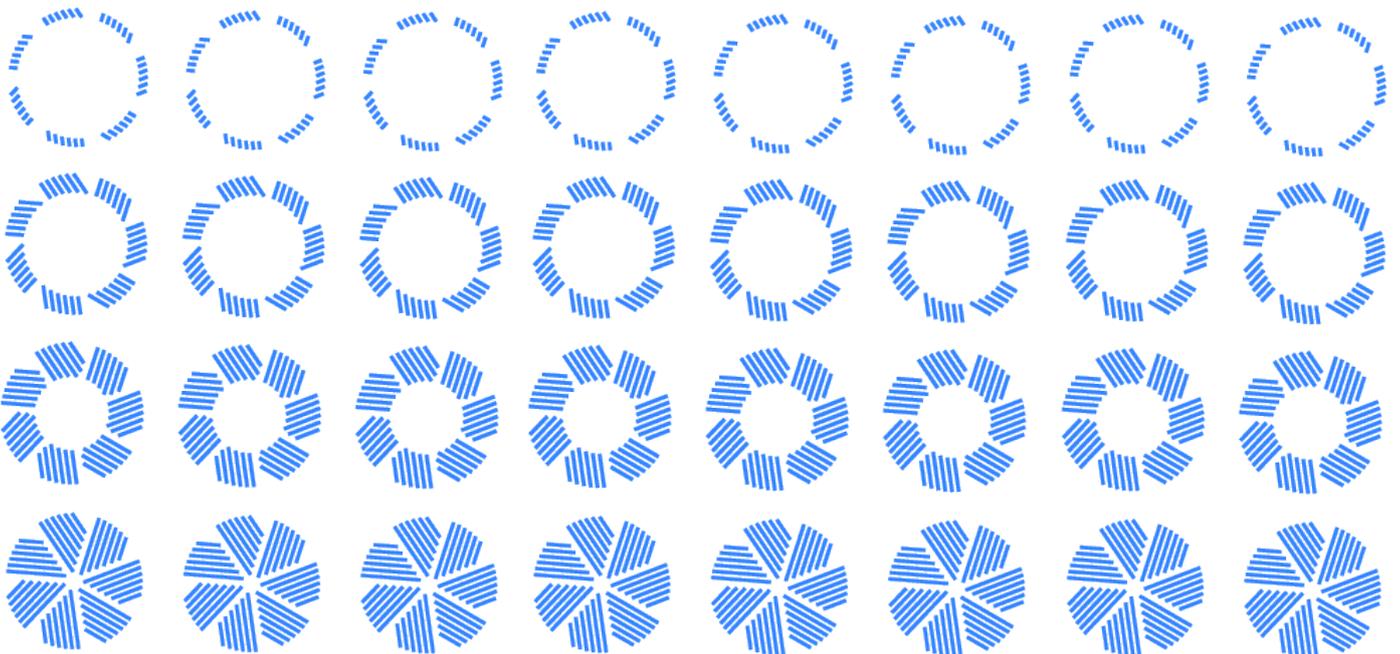


CFA Institute

University Affiliation
Program

UNIVERSITY AFFILIATION PROGRAM

Student Guide to Student Scholarships



UNIVERSITY AFFILIATION PROGRAM

Contents

Student Guide to Student Scholarships	1
Student Scholarships	3
Access Scholarships	3
Student Scholarship Eligibility	4
How to Apply	5
Applicant Acknowledgement	8
Applicant Information	9
Additional Application Requirements & Final Acknowledgement	10
Frequently Asked Questions	13

Student Scholarships

CFA Institute Student Scholarship discounts are part of our commitment to promoting the highest standards of ethics, education, and professional excellence. Student Scholarship discounts are offered exclusively through the [University Affiliation Program](#) which consist of academic institutions that broadly align one or more degree programs to the CFA Program curriculum. Student Scholarships are available for CFA Program and CIPM Program exams.

Scholarships are awarded by the Principal Contact (PC) at each participating university, and some may require additional documentation as part of a complete application. If applicable, any additional necessary documents are detailed in the [Additional Requirements Before Submission](#) pdf. If a university is not listed, then no additional documentation is required as part of a complete application.

Access Scholarships

Note that in addition to the CFA Program Student Scholarship program there is an additional opportunity for students to register at a discounted rate by also applying for the [Access Scholarship](#). Access Scholarships are available for individuals who may not be able to afford the program fees. There is no minimum or maximum income or asset level. The Access Scholarship has 4 application windows per year that align with each exam window.

Student Scholarship Policies

- CFA Program Student Scholarship discounts reduce the exam registration fee to \$600 and waive the one-time program enrollment fee which provides a scholarship discount of approximately \$1,000 off the standard cost for a new candidate.
- Scholarship decisions are final and non-transferable.
- Scholarship discounts can be used for any exam that is open and available for registration within six months of the date of the award.
 - Candidates must register within the six months window to claim their student scholarship discount. Candidates are not required to sit the exam within the six-month window.
- To avoid unused scholarship awards that would be valued by other applicants, all scholarship awards should be utilized. Recipients that do not both register and sit for the exam will forfeit future scholarship opportunities.
- Recipients must pass the exam within two attempts or forfeit future scholarship opportunities.
- Paid deferrals are not permitted for scholarship recipients. Emergency deferrals are permitted, if approved.
- Discovery of false information in the scholarship application or misuse of the application will be referred to Professional Conduct (PC) and the applicant will forfeit future scholarship opportunities.

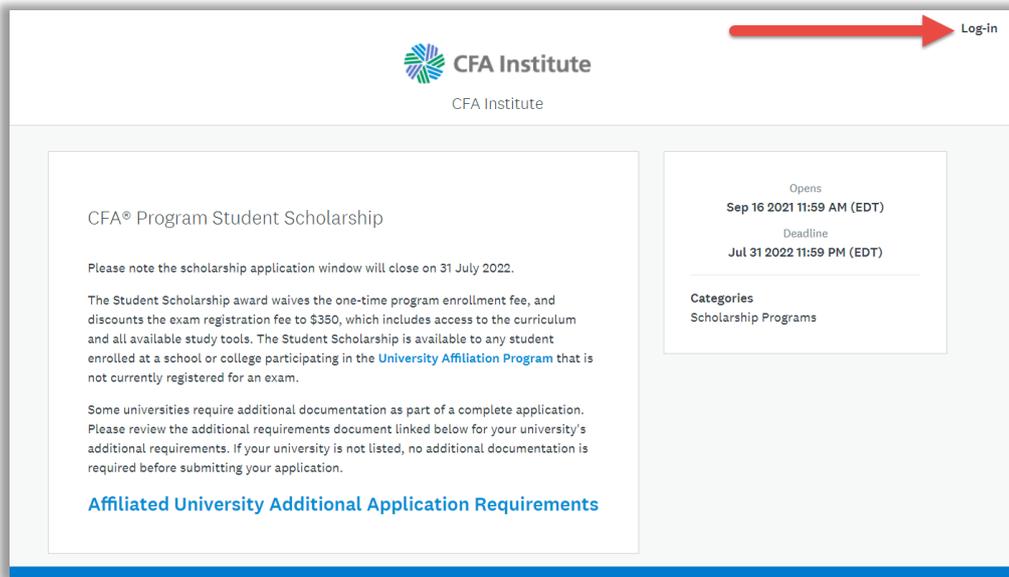
Student Scholarship Eligibility

To apply for a CFA Program Student Scholarship discount the applicant must:

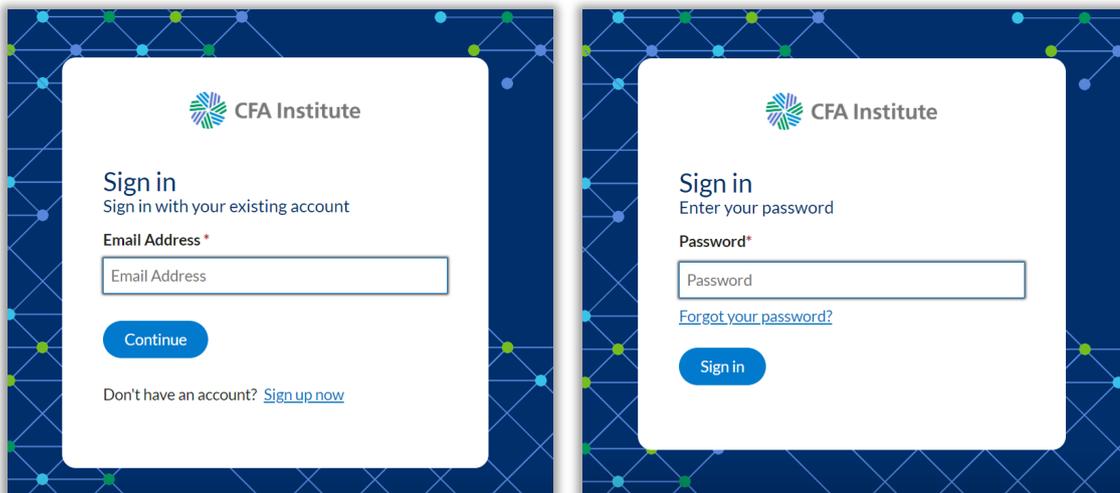
- Not be currently registered for an exam
- Be enrolled at an affiliated university.
 - o Note applicants are not required to be enrolled in an affiliated degree program to be eligible to apply for or receive a Student Scholarship discount unless otherwise noted in the [Additional Requirements Before Submission](#) document.

How to Apply

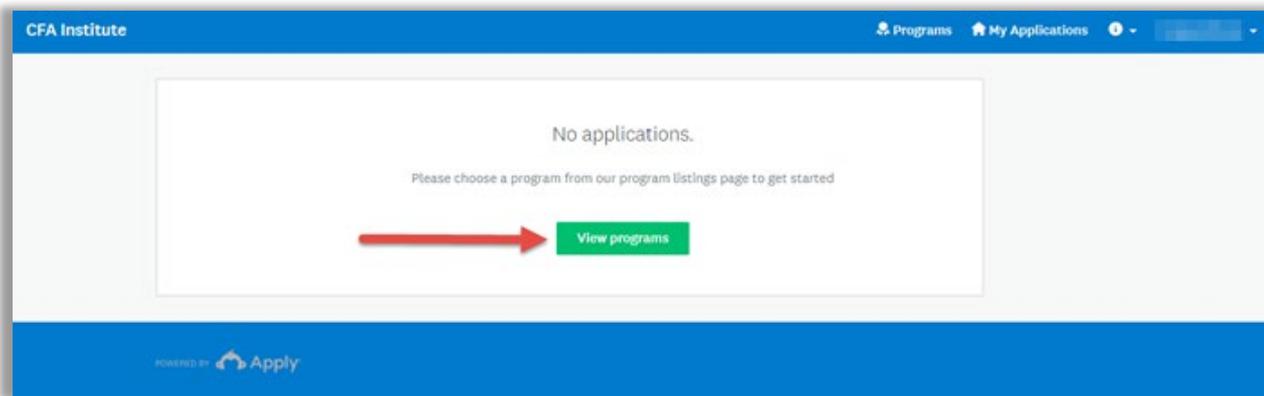
1. Access the online scholarship platform at https://CFAI.smapply.io/prog/cfa_program_student_scholarship



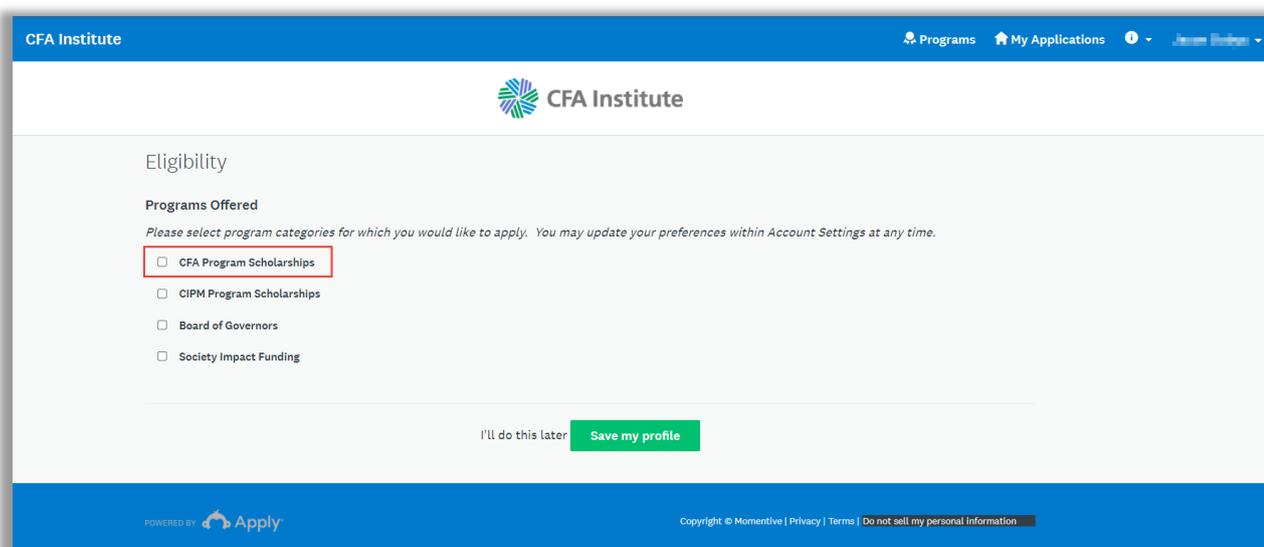
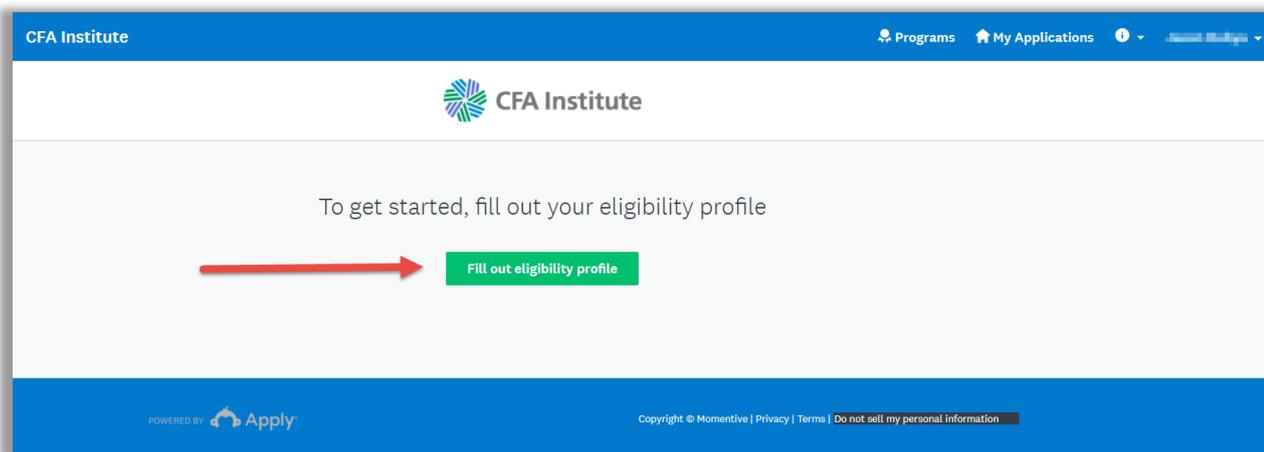
Log in with your CFA Institute username and password. You must log in using your CFA Institute username and password. If you are not sure of your username and password please call our Global Contact Center for assistance in retrieving that information at 1-800-247-8132 or consult this page (<https://www.cfainstitute.org/en/utility/phone-numbers>) for additional toll-free numbers. If you don't have an account, you must create one to continue.



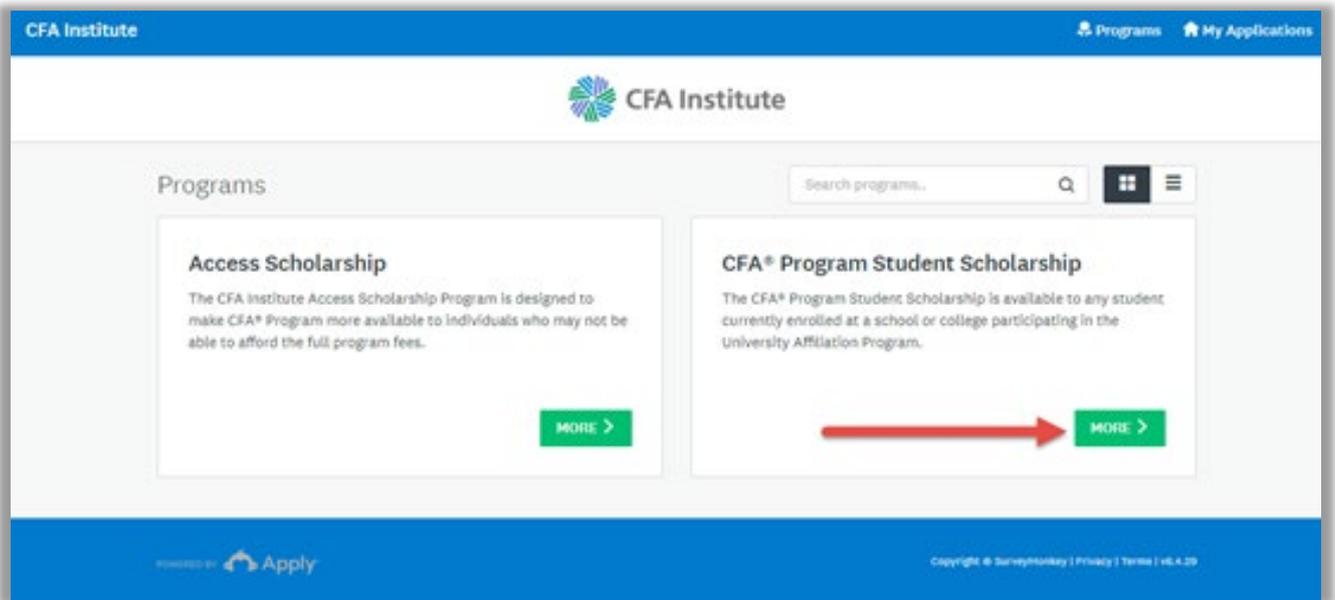
2. Click the green 'View programs' button to see the available scholarship programs.



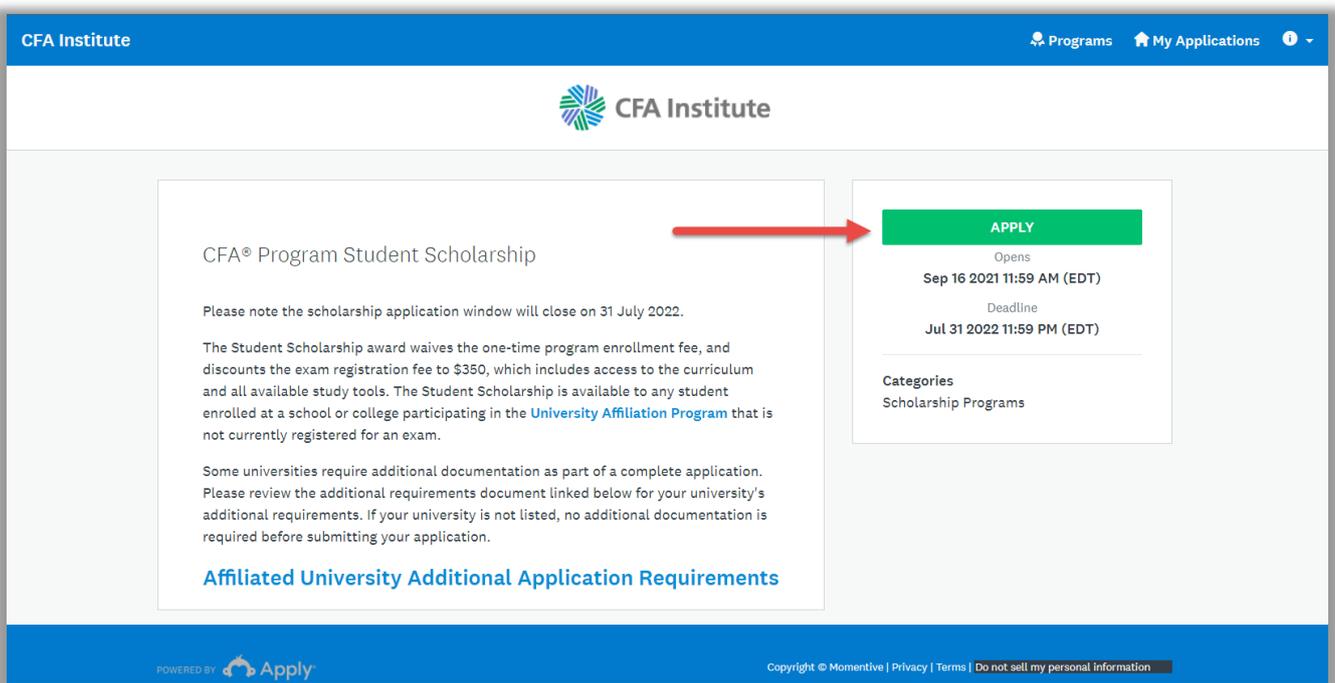
3. If it is your first time applying for a Student Scholarship complete your eligibility profile by selecting the 'CFA Program Scholarships' and 'CIPM Program Scholarships' option and click the 'Save my profile' button.



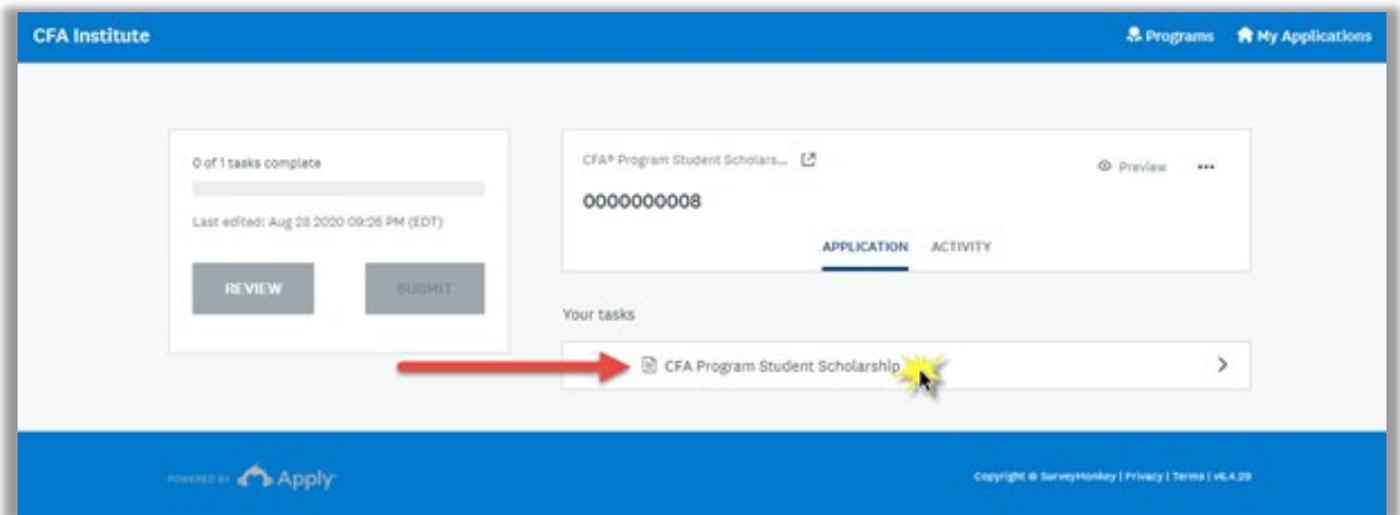
4. Click 'More' in the CFA Program or CIPM Program Student Scholarship panel.



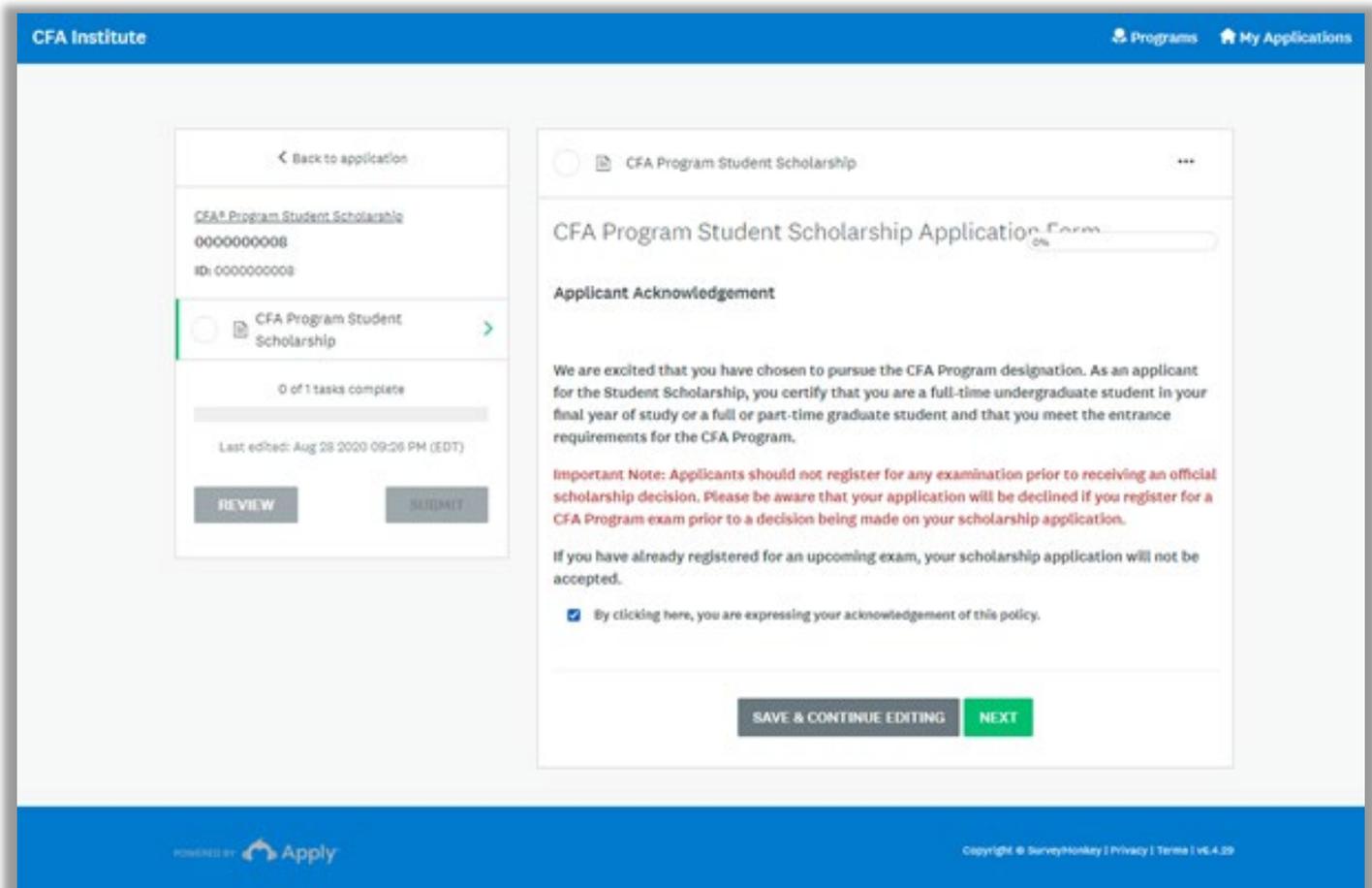
5. Click 'Apply'.



6. Under 'Your tasks' select 'CFA Program Student Scholarship' to begin and complete the fields on the following pages.
- Applicant Acknowledgement
 - Applicant Information
 - Additional Application Requirements & Final Acknowledgement



Applicant Acknowledgement



Applicant Information

CFA Institute Programs My Applications

[Back to application](#)

CFA® Program Student Scholarship
0000000008
ID: 0000000008

CFA Program Student Scholarship

0 of 1 tasks complete

Last edited: Aug 28 2020 09:29 PM (EDT)

[REVIEW](#) [SUBMIT](#)

CFA Program Student Scholarship

CFA Program Student Scholarship Application Form ✓ Draft saved

65%

***Indicates a required field**

Select University

This scholarship is available to students of a university participating in our University Affiliation Program. Student Scholarships are evaluated by the Principal Contact at your university.

Please select the Affiliated University you are currently enrolled at: *

[Clear](#)

Please select your current level of study: *

Please enter the degree program you are currently pursuing (examples: Bachelor of Science in Finance, Master of Business Administration, etc.) *

Applicant information

First (Given) Name

Last Name (Surname or Family Name)

Email Address

Gender *

[PREVIOUS](#) [SAVE & CONTINUE EDITING](#) [NEXT](#)

Additional Application Requirements & Final Acknowledgement

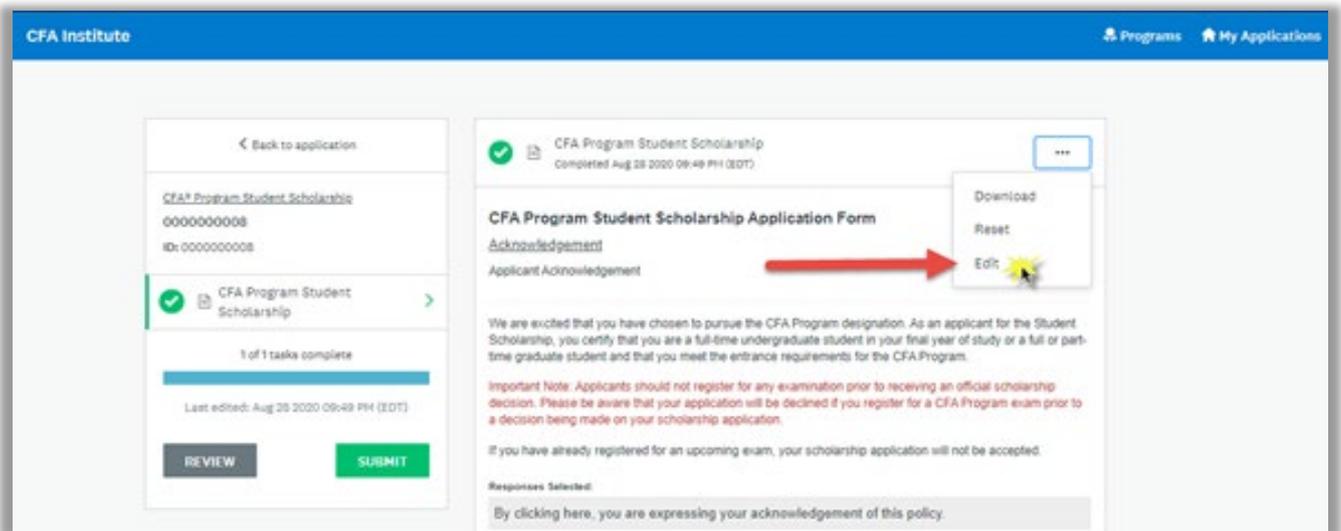
Your university may require additional information as part of a complete application package. If applicable, before submitting your application ensure you attach the necessary documents as detailed in the [Additional Requirements Before Submission](#) pdf. If your university is not listed, you are not 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 a checkbox for 'By clicking here, you are expressing your acknowledgement of these terms.' and three buttons: 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'MARK AS COMPLETE'. A red arrow points to the 'MARK AS COMPLETE' button.

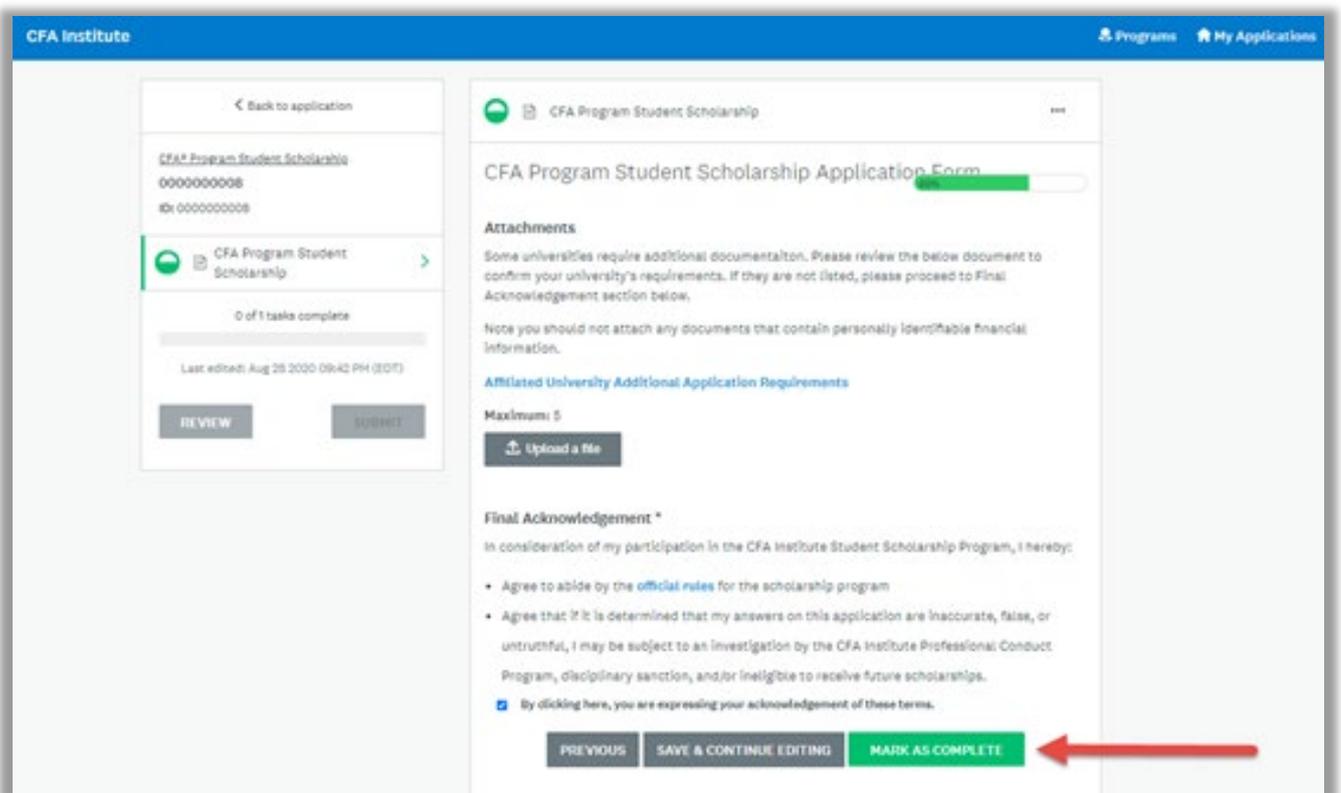
7. Click the 'Mark as Complete' button. You will then be taken to the Review page where you are able to review each of your responses. Ensure the application is complete and you are satisfied with your responses. Once you submit your application, you are no longer able to edit your responses.

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 a confirmation message and an 'Important Note'. Below this is the 'Applicant Information' section, which includes a 'Select University' dropdown menu. A red arrow points to the 'SUBMIT' button.

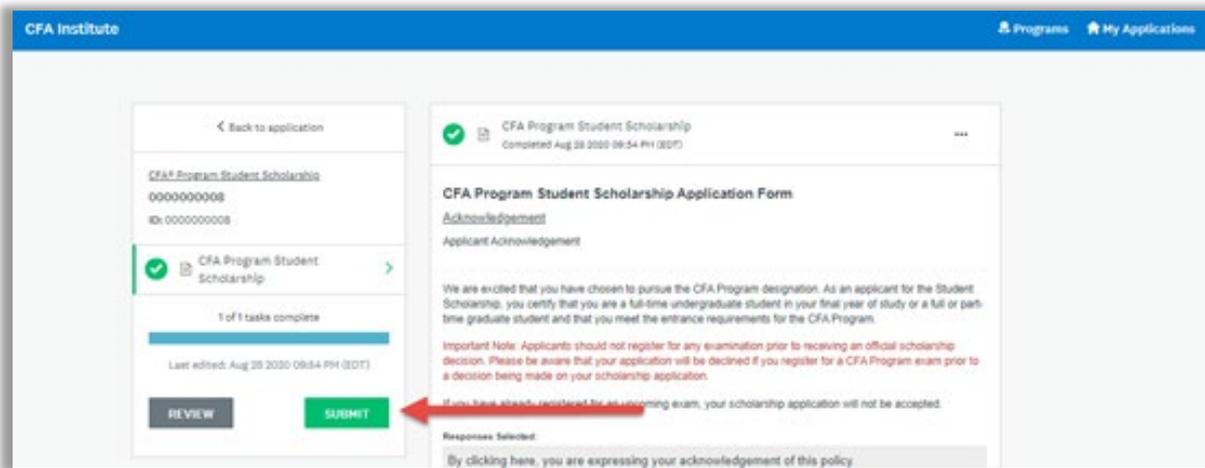
8. If you need to change any of your responses, click on the '...' and select 'Edit.'



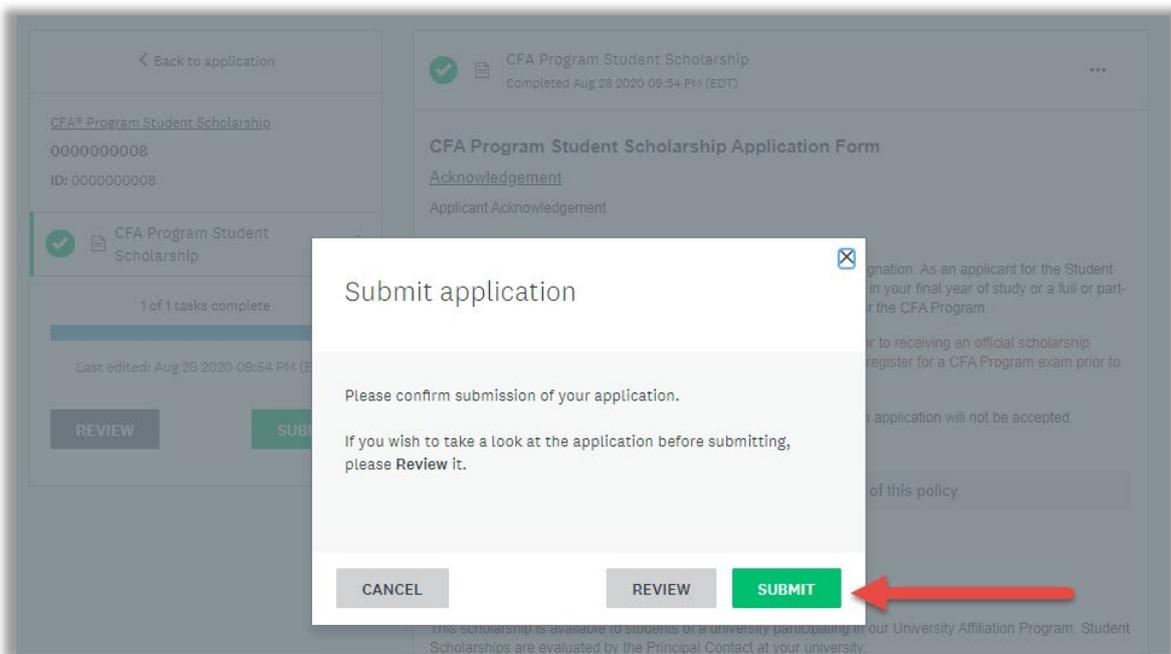
9. Your application will be opened, and you may navigate through each page to make any needed changes. Once you have made the necessary changes click the green 'Mark as Complete' button.



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



11. 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.



CFA Institute

University Affiliation
Program

We have received your CFA[®] Program Student Scholarship submission. Please note that scholarship decisions are made by professors throughout the year and are not based on a specific exam cycle. **Professors are required to enter their award decisions by 31 July 2025.** Once an award decision is made, you will receive an email notification with details on next steps for exam registration.

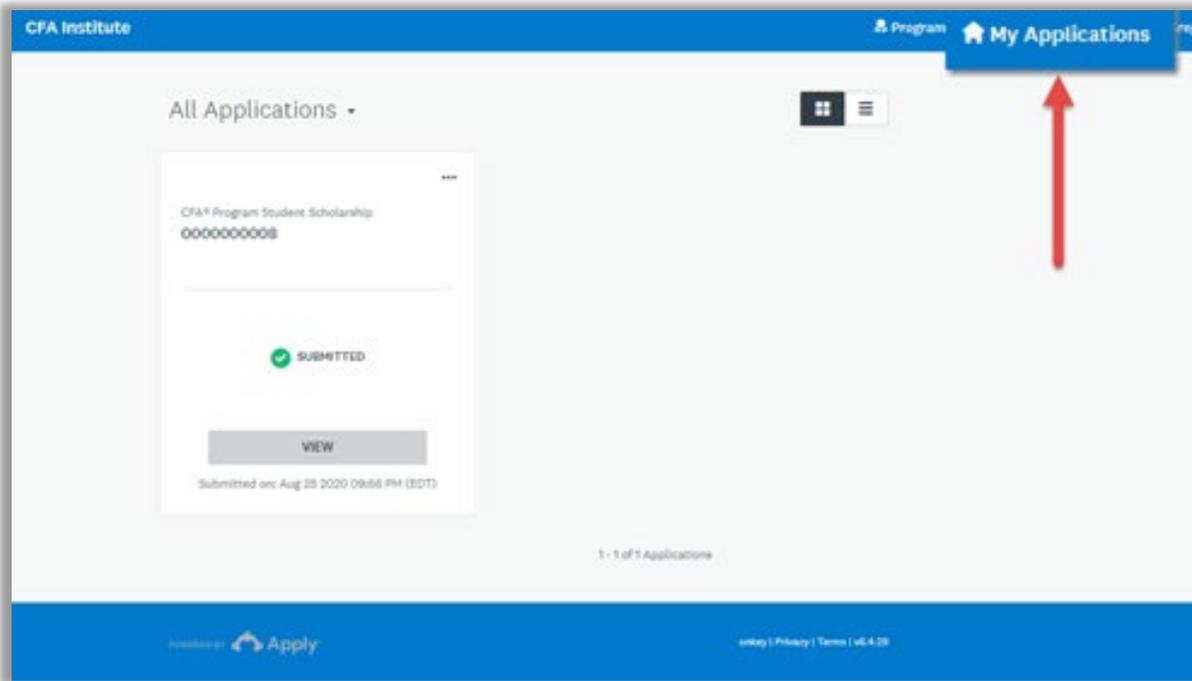
It is important to note that if you complete the CFA[®] Program exam registration before receiving your official award notification, your application will be voided.

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

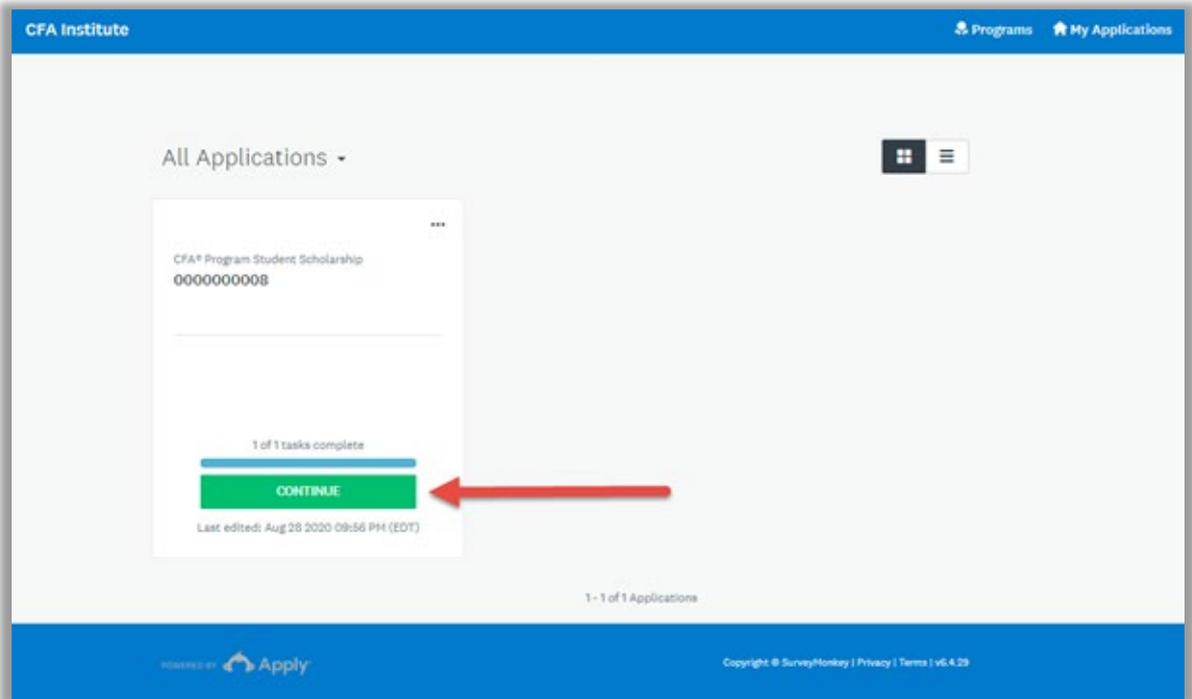
Please email scholarships@cfainstitute.org to request your application be withdrawn. Note that this will remove your application completely. You may apply for the scholarship again as you are eligible.

Can I edit my application after I submit it?

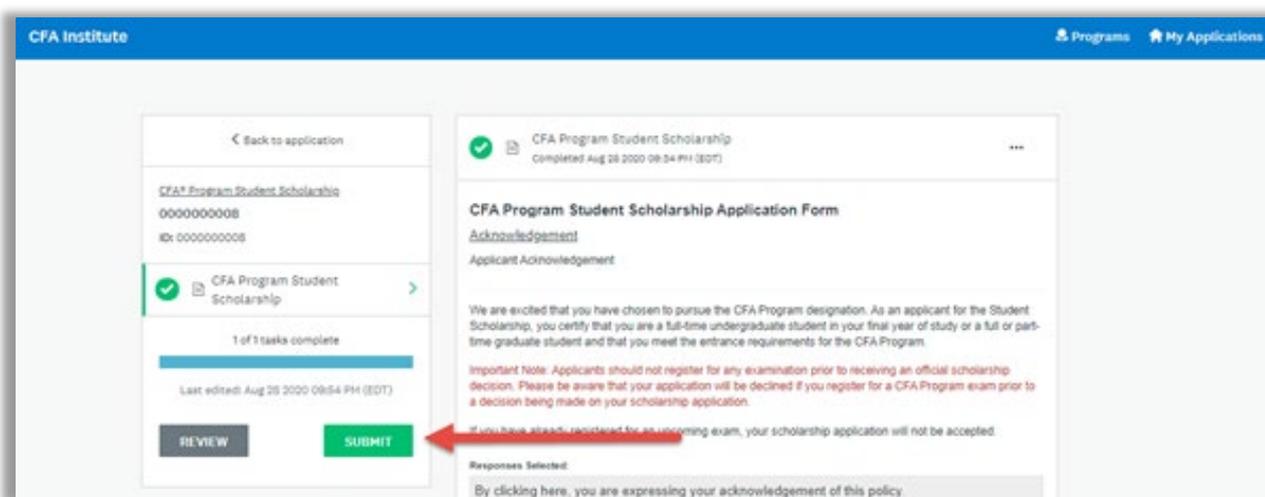
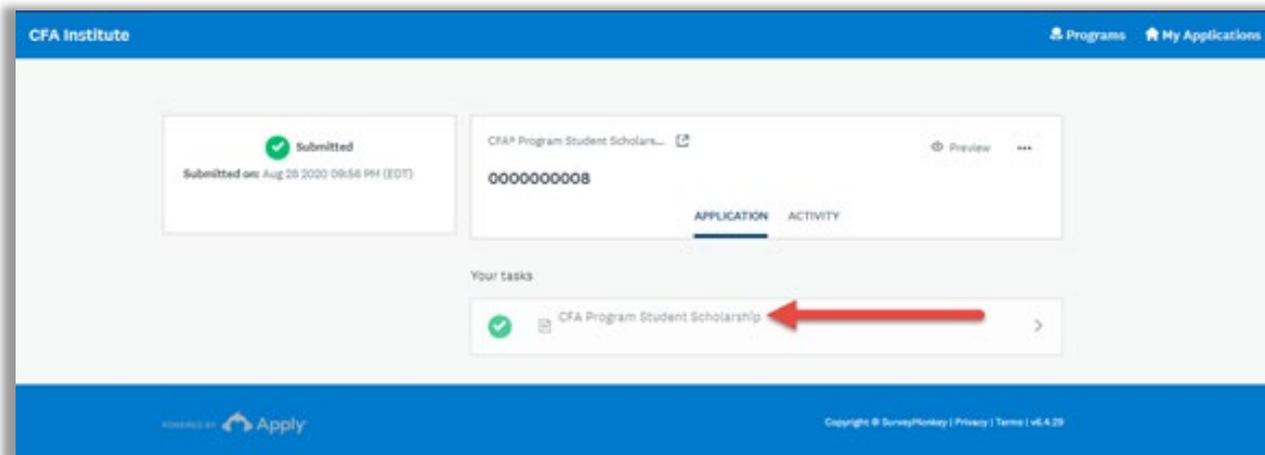
Once you have submitted your application you are no longer able to make edits. However, if you need to update your application, please email scholarships@cfainstitute.org and request that your application be 'reopened.' Once you receive email confirmation that your application is open, return to your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



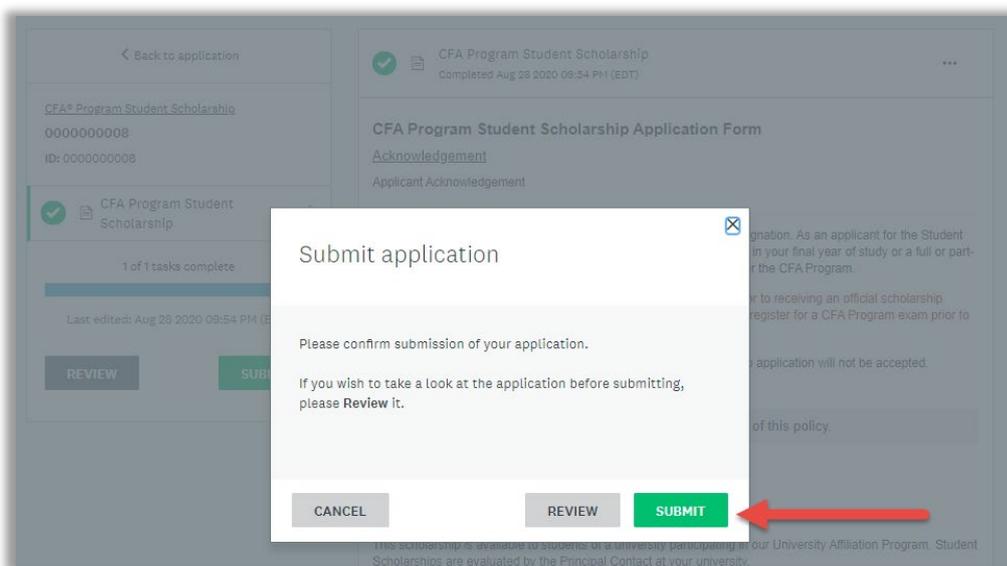
Click on the green 'Continue' button to make any needed changes to your application.



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 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 USD600 under the standard registration package. Your registration includes full access to the curriculum and standard study tools. You may be presented with the option to purchase additional products at the time of registration. If you decide to purchase the Plus or Premium Package, the USD 49 or USD 299 cost will be added on to your scholarship award automatically at checkout.

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.

Your CFA Program Student Scholarship discount will expire **six-months 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.

If you are '**Not Selected for Award**' you will receive 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 six-months 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](#).

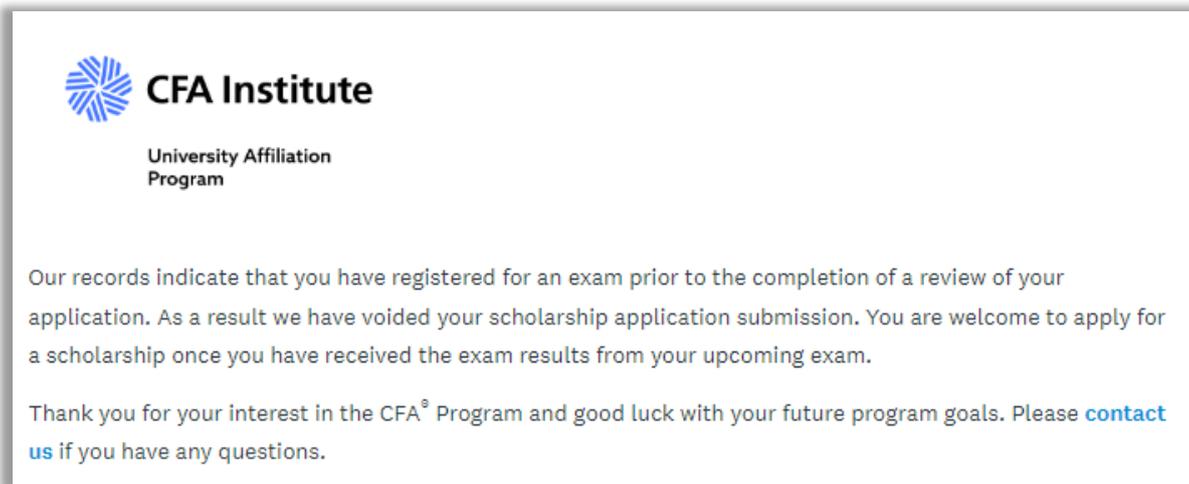
Important registration note: The full exam fee(s) will display on your initial exam registration page. You will see the final, early exam registration fee reflected in the payment section during the checkout process. Please be certain of the [payment method](#) you wish to use before you reach the checkout.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

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

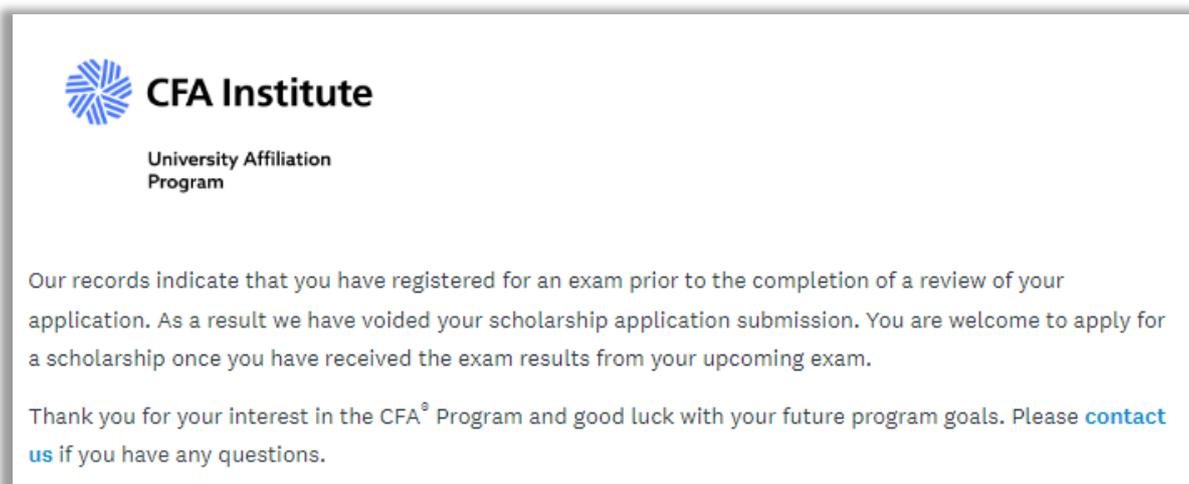
No, registered candidates are not eligible. Once you receive your exam results you are welcome to apply for a scholarship for a subsequent exam.

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.