

ANU Research School of Finance, Actuarial Studies and Statistics

CFA Institute University Affiliation Program

In May 2011, ANU was awarded partnership status with CFA Institute for the Bachelor of Finance program. In January 2013, the partnership has been further extended to include the Master of Finance and Master of Applied Finance programs. This recognizes that the degree programs will cover at least 70 percent of the CFA Program Candidate Body of Knowledge including the CFA Institute ethical and professional standards. The partnership program has been revamped in 2017 as the new University Affiliation Program.

Recognition as a CFA Institute Affiliated University signals that the degree's curriculum is closely tied to professional practices and is well suited to students preparing for the CFA exams. In addition, The CFA Institute University Affiliation program offers unique benefits to our students including access to mock exam questions exclusive to Affiliated Universities and gaining access to professional development opportunities provided in conjunction with CFA Society of Sydney and other key industry bodies.

About the CFA Program

The CFA Program sets a standard for developing the skills, standards, competence, and integrity of financial analysts, portfolio managers, investment advisers, and other investment professionals worldwide. It is widely considered the investment profession's most rigorous credentialing program. More information may be found at: www.cfainstitute.org.

To become a CFA charter holder, you must complete three exams in addition to other professional requirements. Each exam requires approximately 300 hours of preparation and study materials are provided by CFA as part of the examination fee. As part of the CFA Institute University Affiliation Program, CFA Institute offers 4 Awareness Scholarships that cover part of the exam fee every fiscal year to ANU students enrolled in the eligible degree programs.

Please note that other scholarships are also provided by CFAI to help students sit the CFA exams. Please visit CFAI web page for more information.

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CFA Institute University Affiliation Program Scholarships

Eligibility

Applicants must be full-time ANU students enrolled in the final year of their Bachelor of Finance program, or full time graduate students enrolled in Master of Finance or Master of Applied Finance at the time of application.

The Scholarship

The program awards **5 scholarships** to successful applicants for the CFA exam in **December 2019 (Level I only)**. Scholarships waive the program enrollment fee and reduce the registration fee, but recipients are still responsible for a portion of the registration fee. Regardless of when a scholarship recipient registers for the exam, their final cost is US\$350. The three-tiered pricing on the exam fees page on the CFAI website does not apply to scholarship recipients. For students who applied but were not successful for the scholarship, they will receive the early registration price regardless of the time of their scholarship application submission. The scholarship recipients are entitled to a reduced registration fee of US\$350 which includes the ebook curriculum (applicable taxes and import fees may apply if printed curriculum is ordered).

Once a student is selected as a successful recipient for the scholarship, the scholarship may not be transferred to another student nor to another exam cycle. The unused scholarship will be forfeited in full by CFAI.

Students should NOT register for the exam prior to applying for a scholarship. See the Student Guide to CFA Program Scholarship Applications (as attached at the end) for explanations.

Application – important changes from previous years, please read carefully

Students are strongly suggested to read the Student Guide to CFA Program Scholarship Application (attached at the end) provided by CFAI before completing the application.

The application for the 2019 December Level 1 exam scholarship closes **8 August 2019 (CFAI system time)**. Please apply via the Scholarships → Awareness Student page in your CFAI account. After filling in the application form online, you must upload your **official ANU transcript** with your application. The application is only complete when you fill in all required

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information and your official ANU transcript is attached. Incomplete applications, late application and late submission of transcript will not be considered for the scholarship.

All applications and scholarship award decision are through the CFAI system. No other forms of applications (eg. Email) are valid. No transcripts from other universities or institutions are acceptable. A screenshot of your academic results or a downloaded file from the student ISIS system is not acceptable as official ANU transcript. Please consult the school or college admin staff for the procedure of obtaining an official ANU transcript.

Selection Process

The applicants will be firstly screened for eligibility and then all eligible applicants will be ranked by the weighted GPA of all finance courses on their transcript. A minimum of four finance courses (course code starting with FINM) are required to calculate a weighted average GPA for the purpose of the scholarship selection (CFA exam is not recommended for first year finance students). The selection of successful recipients of scholarship is purely based on the academic merits as measured by the weighted average GPA of all finance courses that the students have completed at ANU. Transferred credits from other institutions and the grades of exempted courses as a result of previous studies at other institutions are not considered, therefore not included in the calculation of GPA for the scholarship.

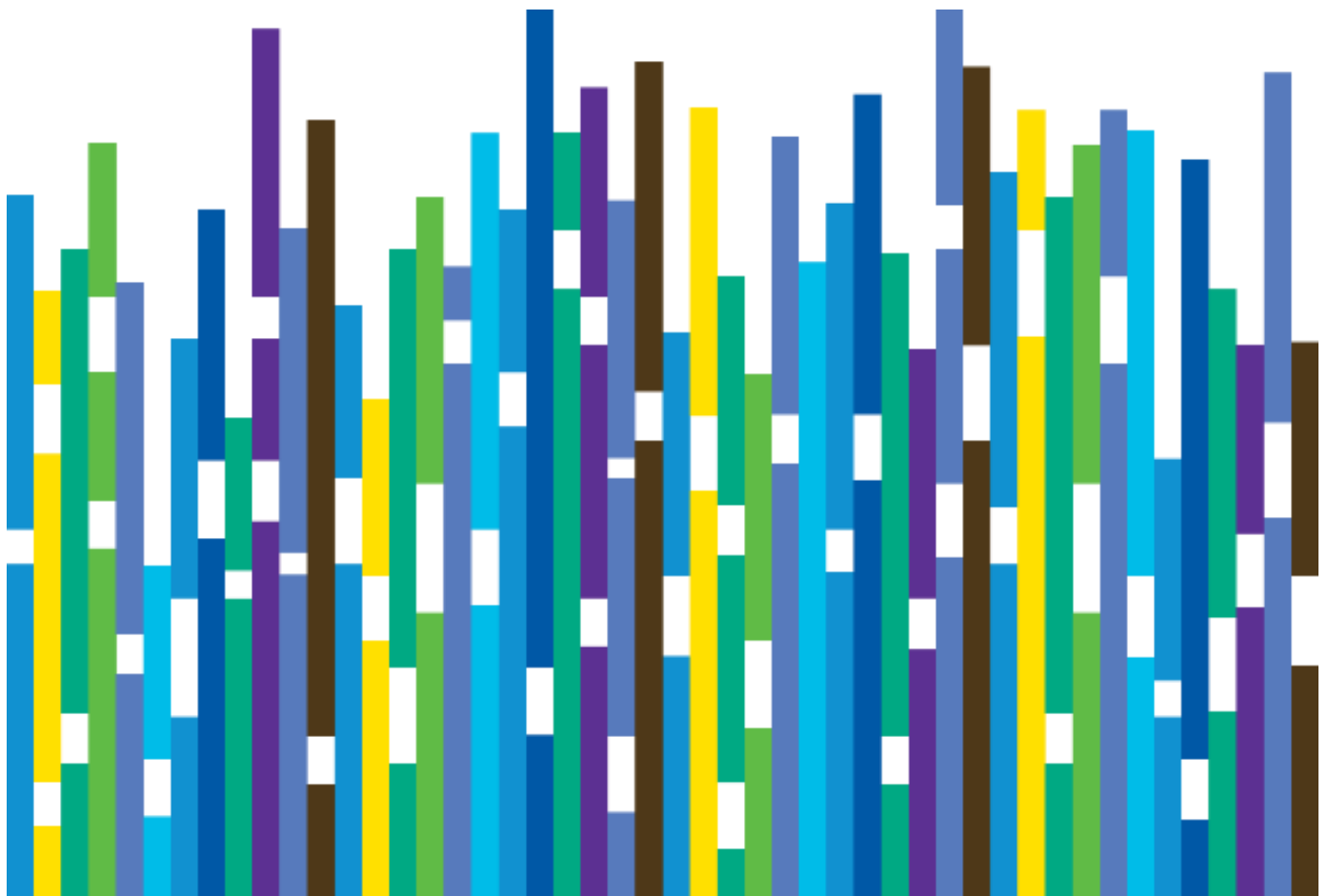
The scholarship decision will be made by 15 August 2019 (CFAI system time). The Scholarships Team at CFAI will get in touch with scholarship recipients via email afterwards. The progress and outcome of the scholarship can be viewed in student's CFA Institute account when available.

For more information about the scholarship and application procedure, please contact the ANU CFA Institute University Affiliation Program Director Hua.Deng@anu.edu.au

UNIVERSITY AFFILIATION PROGRAM: GUIDE TO CFA[®] PROGRAM STUDENT SCHOLARSHIPS FOR STUDENTS

How to apply for a student scholarship

v.FY20



UNIVERSITY AFFILIATION PROGRAM: STUDENT 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.

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

Accessing the Scholarship Applications:

PLEASE NOTE: All scholarship application selections are made online by the Principal Contact.

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.

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 with any questions or concerns you may have.

Frequently Asked Questions for Students:

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, the Principal Contact has sole discretion in awarding scholarships.

Some universities require specific documents, such as transcripts, essays, etc., in support of applications that should be uploaded to the Scholarship Platform. Because the Scholarship Platform cannot be customized for each university, you are responsible for ensuring that you are aware of such requirements. Contact the PC of your university to learn more about their requirements.

Should I 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 access to the scholarship application. If you erroneously register before applying for a scholarship, please email university@cfainstitute.org for next steps. You will, however, need to register after you are notified of your application's outcome, and will receive notice of next steps at that point.

Who awards the scholarships?

The Principal Contact (PC) of the affiliated university has complete control of scholarship awards.

Are scholarships transferrable?

No. Once you are selected, the scholarship may not be transferred to another student nor may it be applied to a future exam offering.

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

What if I want to start studying soon?

Level I

The Level I curriculum is now integrated into the [Learning Ecosystem](#), so there is no option to purchase a digital version from CFA Institute. You can purchase the digital curriculum from a third-party seller, but you will not receive a credit for your purchase when registering for the exam.

Level II & Level III

The Level II and III digital curriculum and study tools can be purchased prior to registration by contacting us via telephone and providing credit card details. The cost of this purchase will be deducted from your registration fee.

For All Level Applicants

A print version of the curriculum may be purchased separately. The print curriculum is not included in the exam registration fee, therefore we do not issue credits to applicants who purchase the print curriculum in advance of exam registration. Scholarship candidates are also responsible for shipping costs and any applicable import duties and taxes related to purchasing the print curriculum.

What happens when I submit an application?

A scholarship application confirmation email will be sent to you upon submission of your application informing you that CFA Institute has successfully received your application.

What should I be aware of if I am awarded a scholarship?

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

Once awarded, how do I know when and how to register?

Once your PC has selected scholarship recipients, those students will be notified via email within 2-3 weeks of selection that they received the award. If you are awarded a scholarship, below is the text of the scholarship award email that you 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 I receive if I am NOT awarded a scholarship?

Below is the text of the email that 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.

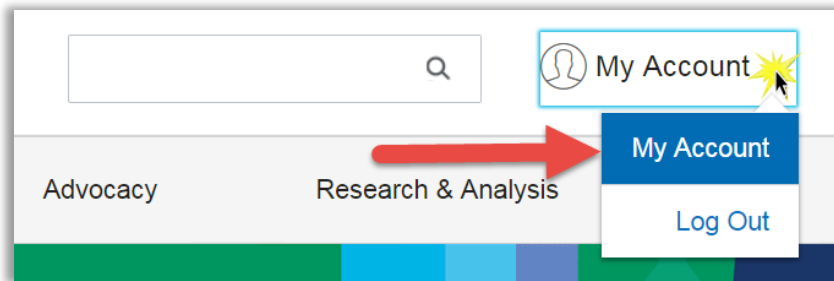
*Best regards,
CFA Institute Global Scholarships Administration*

HOW TO APPLY FOR A STUDENT SCHOLARSHIP

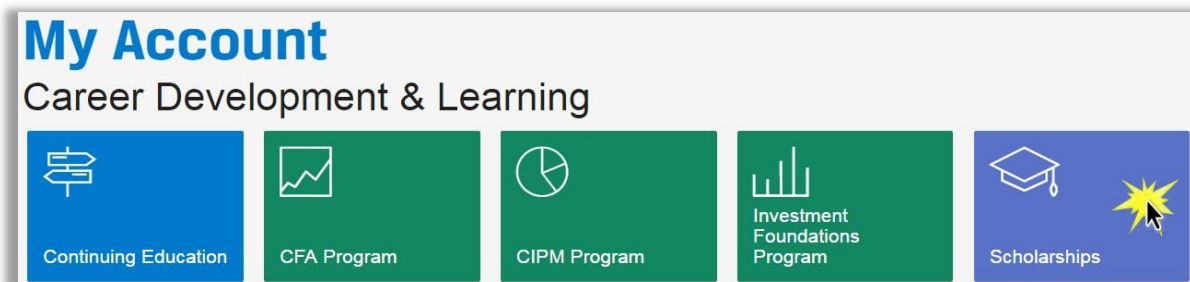
To apply for a student scholarship, navigate to www.cfainstitute.org and log in to your account. If you do not have an account, you will need to create one by clicking one by selecting 'Create An Account'.



Once logged in, click on the 'Your Account' link at the top of the page.




Under the 'Career Development & Learning' section click on the purple 'Scholarships' box.



Continued....

On the next page you are presented with the full list of available scholarships. Click on the link circled in red below to apply for a student scholarship.



CFA Institute

Access
[Apply Access](#)

Awareness Student
[Apply Awareness Student](#)

Awareness Media
[Apply Awareness Media](#)

Awareness Professor
[Apply Awareness Professor](#)

Please read the instructions at the top of the page. Then select the exam offering you would like to apply for by clicking on either the December (September deadline) or June (February deadline) exam offering. You are not able to apply for both exam offerings

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 *

<input type="radio"/> Level I	<input type="radio"/> Level I
Application deadline: 01 Feb 2019	Application deadline: 02 Sep 2018

Continued....

The Applicant Information section will populate your CFA Institute ID, Email Address, Given Name, Surname, Suffix, Date of Birth, and Gender. If any of this information is incorrect, continue with the application and once submitted you should email info@cfainstitute.org to correct any error in your account information.

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

Select Suffix ▼

Date of Birth *

Day * Month * Year *

 ▼
Gender *

Female Male Prefer Not to Answer

Continued....

The below is a continuation of the Applicant Information. Please complete all required fields.

Phone *

Country / Region code * **Phone Number (add numerical digits only)***

USA +1

Name of College / University *

Select College / University

College / University website URL *

Education *

Undergraduate Graduate

Current year of study *

Select Years of Study

The next section will ask you how you learned of the Student Scholarship. You are required to select from the drop- down menu. The 'Attachments' section allows you to upload any document that may be required by your professor when submitting your application. If your professor has not instructed you to submit documentation, please proceed to the next section.

Scholarship Referral *

How did you learn about Student Scholarships? If other, please specify

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

Select Attachment Type No file chosen

Continued....

The Acknowledgement section is the final section of the student scholarship and you must agree to the statements to submit your scholarship. Please click the box next to 'I agree to the statements above' once you have reviewed and considered each statement.

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.

To submit your application to your professor for review, click on [Save and Submit](#). If you are not ready to submit your application for review, click on the [Save for Later](#).

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.

[Contact us](#) to purchase the eBook curriculum in advance of registration.

[Save for Later](#)

[Save and Submit](#)

If your application is submitted successfully, you will see the below message and you will receive an email confirmation to the email address you provided when submitting your application.



Thank you for applying. Your application was submitted successfully.

The Scholarships Team will contact you regarding your application before the deadline of 9/1/2018

Continued....

Shortly after clicking [Save and Submit](#) and receiving the above confirmation message you should also receive an email confirming we received your student scholarship application. Below is a sample of a confirmation email.



CFA Institute

CFA Institute ID:

Dear

Thank you for your interest in our CFA Institute Scholarship Programs.




We are in receipt of your June 2019 scholarship application. Our application review and processing times vary. However, you can expect a formal decision no later than one week after the application submission period ends. We will contact you if additional information is required.

You can check your application status online by visiting www.cfainstitute.org, logging in to Your Account, and clicking on the Scholarships page.

Please [contact us](#) if you need anything further.

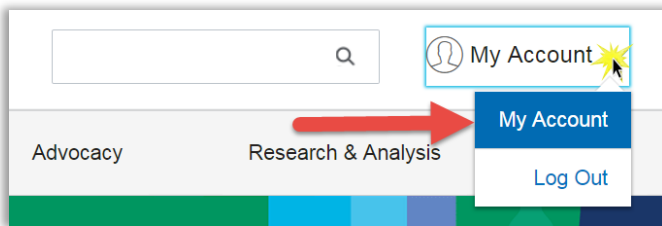
Best regards,
Global Scholarships Administration Team

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915 East High Street
Charlottesville, VA 22902
[Contact Us](#)

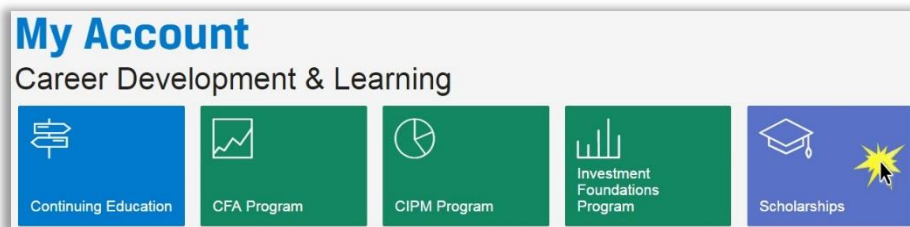
 [CFA Institute on Twitter](#)
 [CFA Institute on LinkedIn](#)
 [CFA Institute on Facebook](#)

HOW TO WITHDRAW YOUR STUDENT SCHOLARSHIP APPLICATION

Log into your CFA Institute account from any page on the cfainstitute.org website.



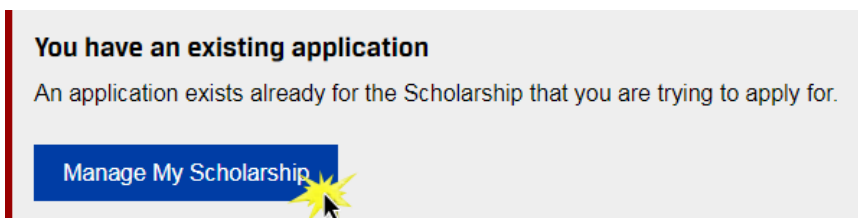
Under the 'Career Development & Learning' section click on the purple 'Scholarships' box.



On the next page you are presented with the full list of available scholarships. Click on the link circled in red below.



Click on 'Manage My Scholarships'



Click on the 'Withdraw' button to withdraw your current application

