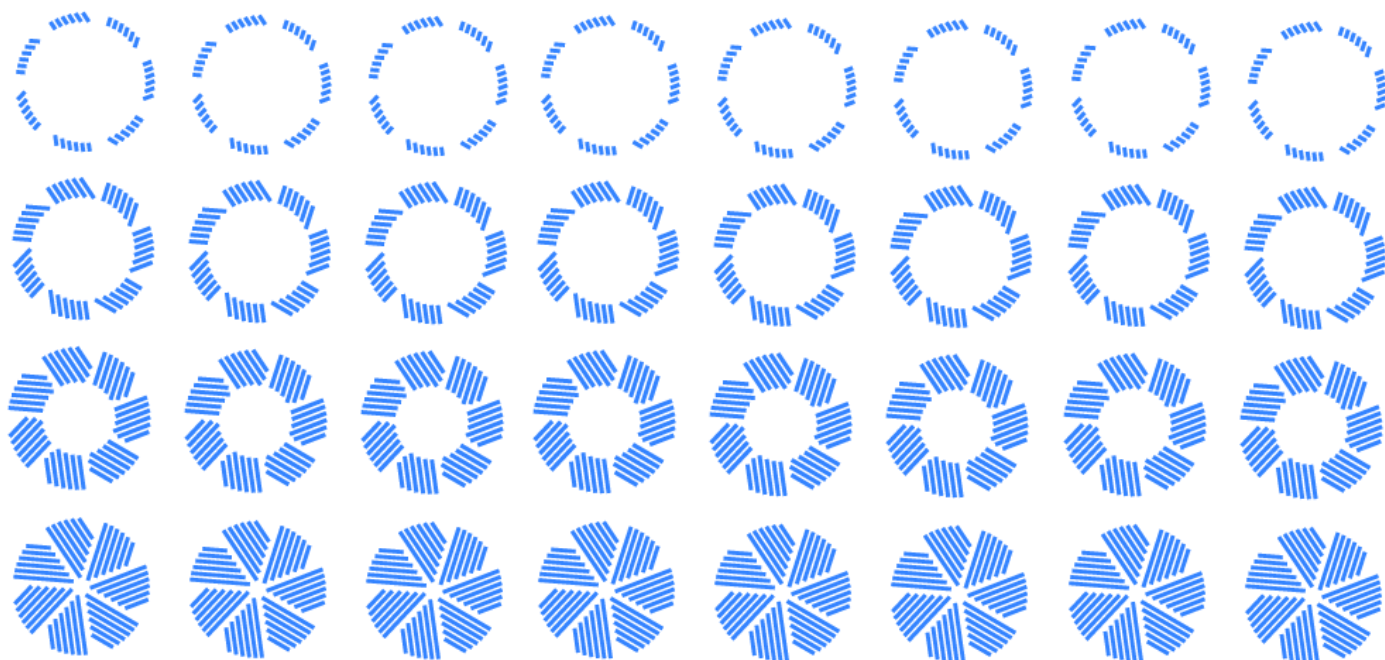




University Affiliation Program

UNIVERSITY AFFILIATION PROGRAM

Student Guide to Student Scholarships



UNIVERSITY AFFILIATION PROGRAM

Contents

Student Guide to Student Scholarships.....	1
Student 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.

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.

In addition to the CFA Program Student Scholarship offered exclusively through the University Affiliation 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.

***** Note** that individuals cannot apply for more than one scholarship at a time. If a student has submitted a CFA Program Student Scholarship, they cannot apply for the Access Program or any other scholarship program until a decision is made on their current scholarship submission.

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.
- 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.

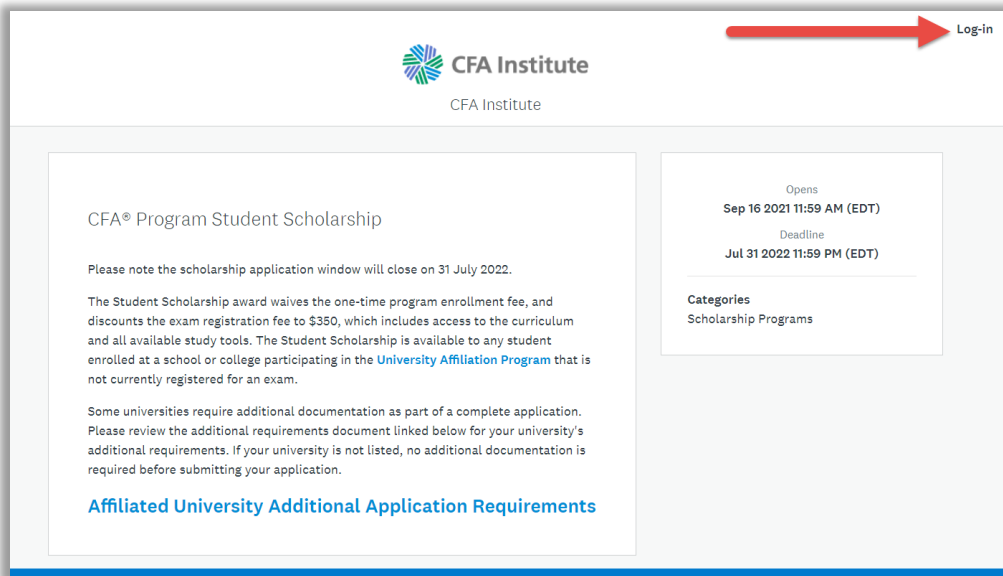
Student Scholarship Eligibility

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

- Not be currently registered for an exam
 - Note that individuals awaiting exam results are considered as registered until their exam results are released.
- Be enrolled at an affiliated university.
 - 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.

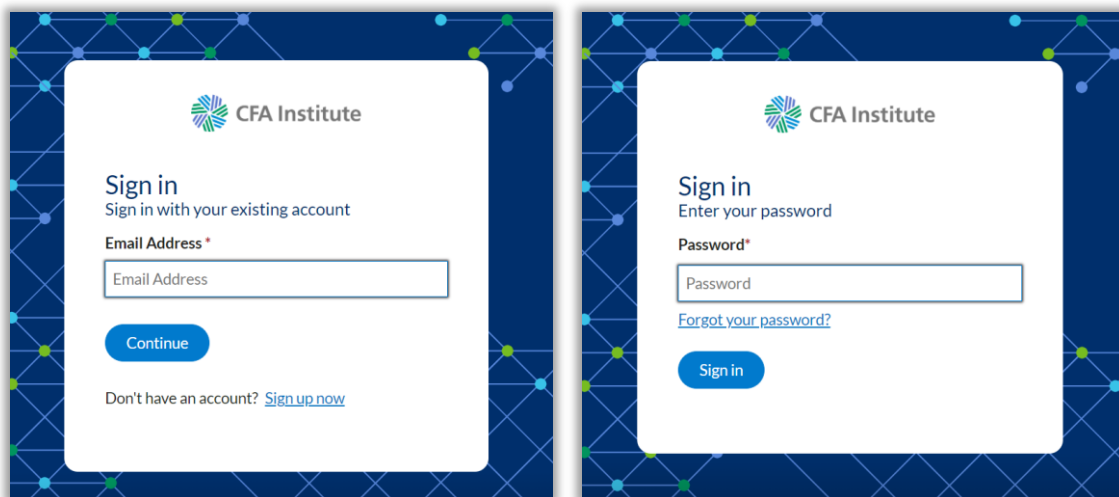
How to Apply

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



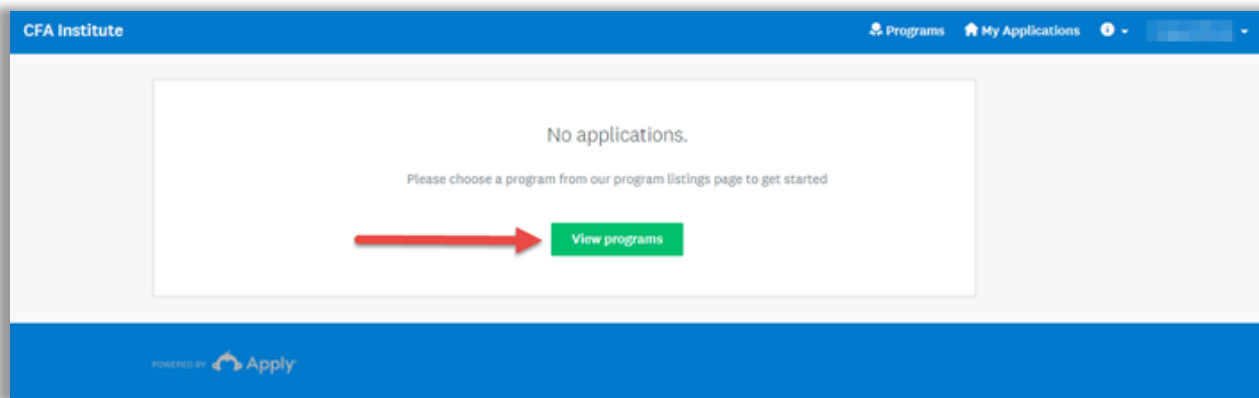
The screenshot shows the CFA Institute logo at the top left. A red arrow points from the top right towards a 'Log-in' link. The main content area is titled 'CFA® Program Student Scholarship'. It includes a notice that the application window closes on 31 July 2022. Below this, there is a paragraph explaining that the scholarship award waives the one-time program enrollment fee and discounts the exam registration fee to \$350. A link for 'Affiliated University Additional Application Requirements' is provided at the bottom left. On the right side, there is a box containing the opening date (Sep 16 2021 11:59 AM (EDT)), the deadline (Jul 31 2022 11:59 PM (EDT)), and the categories (Scholarship Programs).

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.

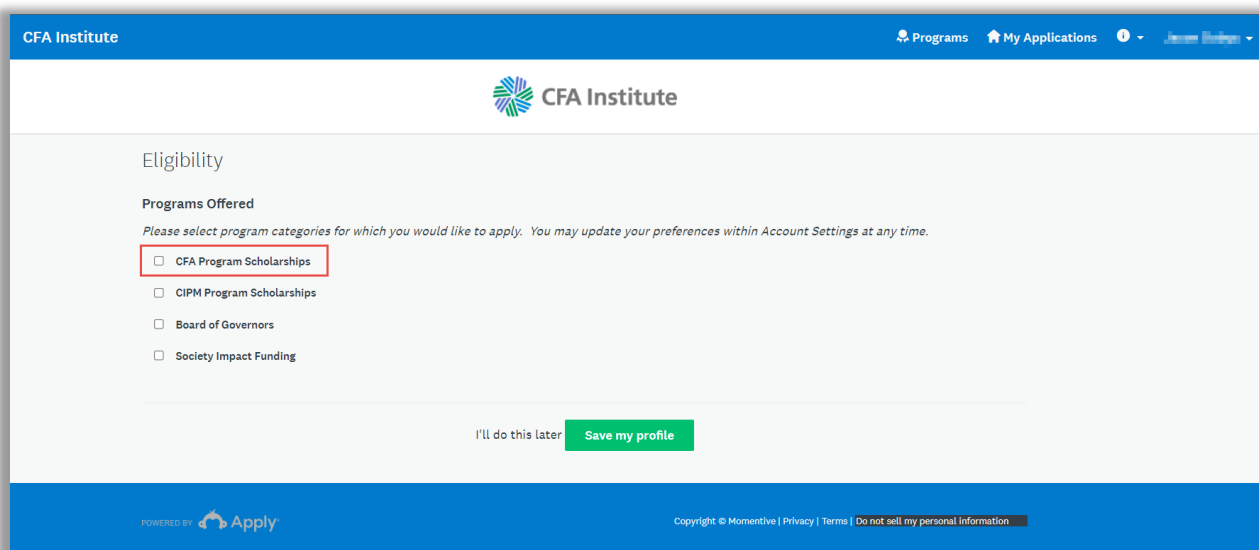
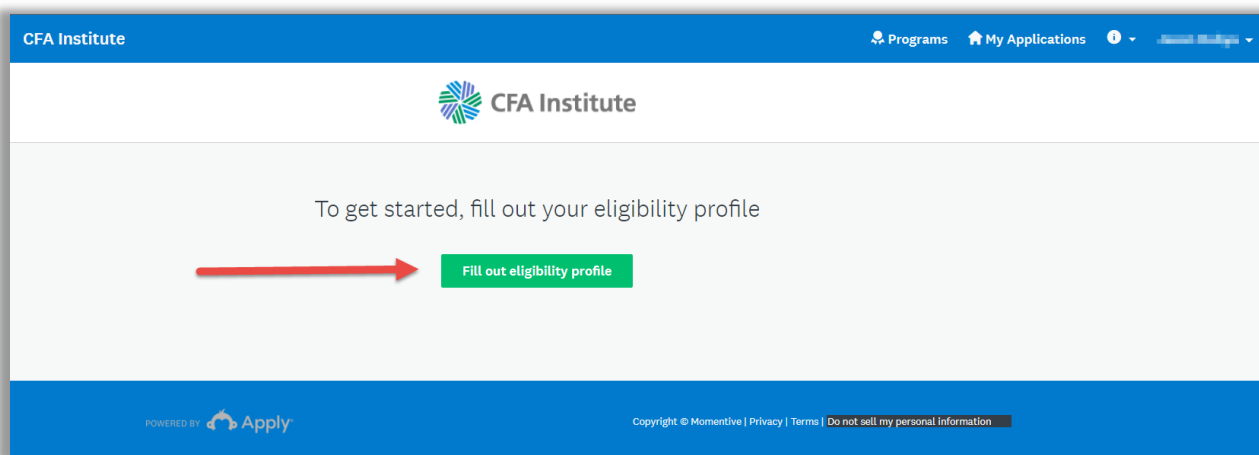


The first screenshot shows the 'Sign in' page with the instruction 'Sign in with your existing account'. It features a text input field for 'Email Address' and a blue 'Continue' button. Below the button, there is a link for 'Sign up now' for users who do not have an account. The second screenshot shows the next step, where the user is prompted to 'Enter your password'. It features a text input field for 'Password' and a blue 'Sign in' button. A link for 'Forgot your password?' is also present above the button.

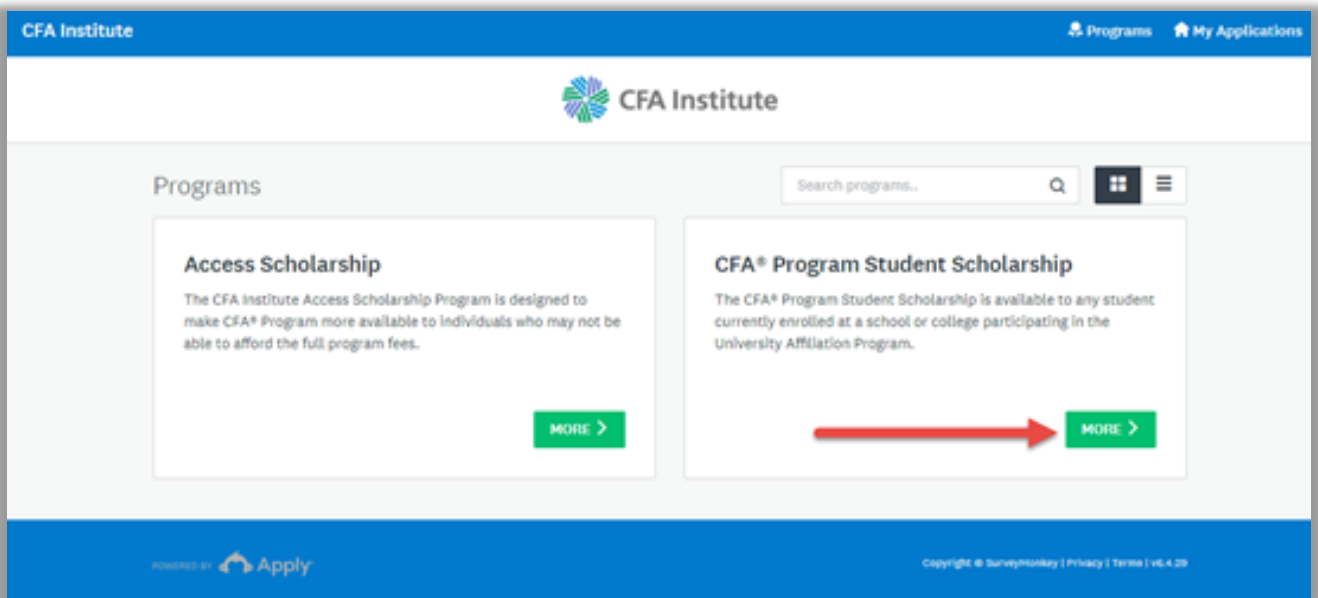
2. Click the green 'View programs' button to see the available scholarship programs.



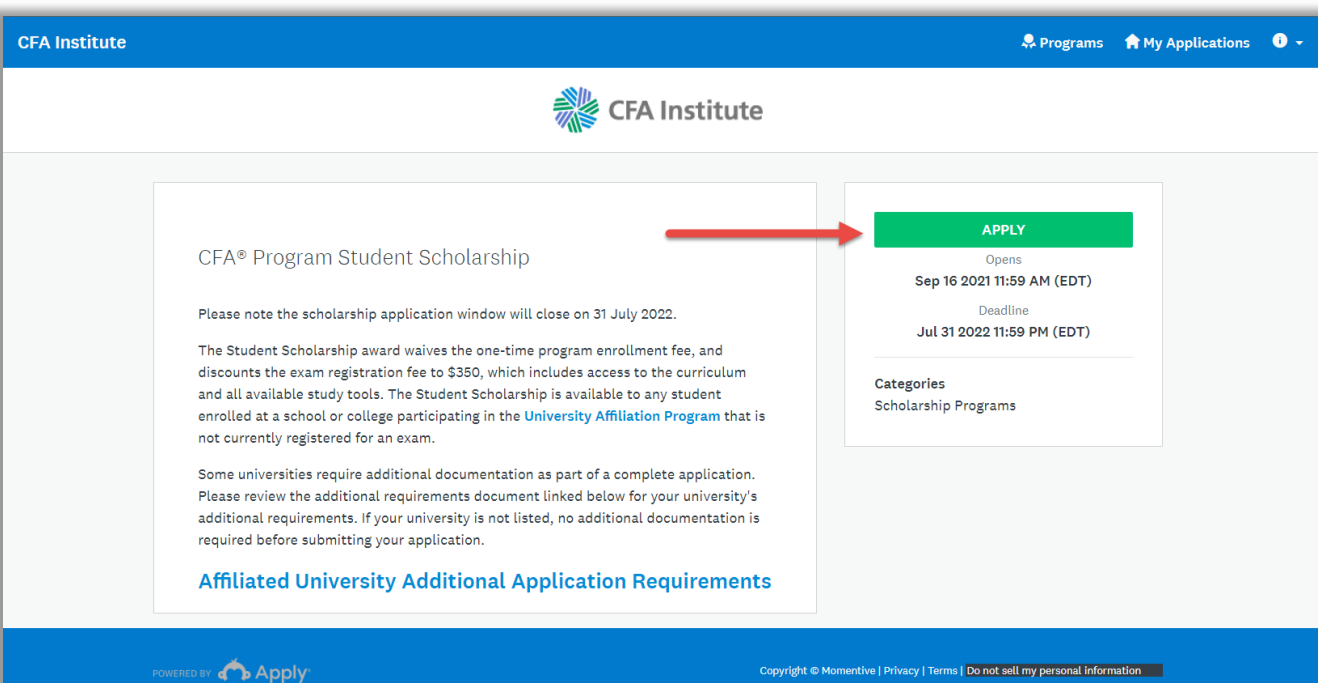
3. If it is your first time applying for a Student Scholarship complete your eligibility profile by selecting the 'CFA Program Scholarships'.



4. Click 'More' in the CFA 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

The screenshot shows the CFA Institute application dashboard. At the top, there's a blue header with 'CFA Institute' on the left and 'Programs' and 'My Applications' on the right. Below the header, there's a main content area. On the left, a box indicates '0 of 1 tasks complete' with a progress bar and a 'Last edited: Aug 28 2020 09:26 PM (EDT)' timestamp. Below this are 'REVIEW' and 'SUBMIT' buttons. To the right, there's a box for 'CFA® Program Student Scholars...' with a 'Preview' link and a '0000000008' ID. Below this, there's a 'Your tasks' section with a list of tasks. A red arrow points to the 'CFA Program Student Scholarship' task, which is highlighted with a yellow star. The footer of the dashboard includes 'POWERED BY Apply' and 'Copyright © SurveyMonkey | Privacy | Terms | v6.4.28'.

Applicant Acknowledgement

The screenshot shows the 'Applicant Acknowledgement' page. At the top, there's a blue header with 'CFA Institute' on the left and 'Programs' and 'My Applications' on the right. Below the header, there's a main content area. On the left, there's a sidebar with 'Institute Privacy Policy.' and a list of bullet points. The main content area contains the following text:

- Knowingly providing false or misleading information in your application is a violation of the CFA Institute Code of Ethics and Standards of Professional Conduct. If we suspect your answers are inaccurate, deceptive, or untruthful, you may be subject to an investigation by the CFA Institute Professional Conduct Program. Disciplinary sanctions may include a suspension or prohibition from participating in the CFA Program. You also may become ineligible to receive scholarships in the future. By applying, you agree to cooperate fully in any investigation relating to your application.
- You understand that you must have a valid, international travel passport to sit for the exam.

Important note: Do not submit this application if you are awaiting an award decision on another CFA Institute scholarship. Do not submit this scholarship application if you have already registered for an upcoming CFA exam or are awaiting your exam results. If you register for a CFA exam prior to receiving an official scholarship decision, your application will be voided.

☒ By clicking here, you are expressing your acknowledgement of this policy.

At the bottom of the main content area, there are two buttons: 'SAVE & CONTINUE EDITING' and 'NEXT'. The footer of the page includes 'POWERED BY Apply' and 'Copyright © SurveyMonkey | Privacy | Terms'.

Applicant Information

CFA Institute

ProgramsMy 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)

REVIEWSUBMIT

CFA Program Student Scholarship

CFA Program Student Scholarship Application Form Draft saved

*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: *

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

CFA Institute

University Affiliation Program

9

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 Institute application form for the CFA Program Student Scholarship. The left sidebar displays the application progress, indicating that 0 of 1 tasks are complete. The main content area shows the 'CFA Program Student Scholarship Application Form' with a progress bar. The 'Attachments' section includes instructions on how to upload documents and a link to 'Affiliated University Additional Application Requirements', which is highlighted with a red arrow. Below this, the 'Final Acknowledgement' section contains a checkbox for agreeing to the terms, followed by 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'MARK AS COMPLETE' buttons. The 'MARK AS COMPLETE' button is highlighted with a red arrow.

7. Click the 'Mark as Complete' button. You will then be taken to the Review page where you can 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 Institute application form for the CFA Program Student Scholarship, now in the 'Review' stage. The left sidebar indicates that 1 of 1 tasks are complete. The main content area shows the 'CFA Program Student Scholarship Application Form' with a progress bar. The 'Acknowledgement' section includes a checkbox for agreeing to the terms, followed by 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'MARK AS COMPLETE' buttons. The 'MARK AS COMPLETE' button is highlighted with a red arrow.

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

The screenshot shows the CFA Institute application form for the CFA Program Student Scholarship. The left sidebar contains a 'Back to application' link, the scholarship title 'CFA® Program Student Scholarship', a unique ID '0000000008', and a progress indicator '1 of 1 tasks complete'. The main content area shows the 'Acknowledgement' section with a green checkmark and a completion date of 'Aug 28 2020 09:48 PM (EDT)'. A red arrow points to a three-dot menu in the top right corner of the form, which contains options for 'Download', 'Reset', and 'Edit'. The 'Edit' option is highlighted with a yellow mouse cursor.

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.

The screenshot shows the CFA Institute application form for the CFA Program Student Scholarship, now on the 'Attachments' page. The left sidebar is identical to the previous screenshot. The main content area shows the 'Attachments' section with instructions to review university requirements. Below this is the 'Final Acknowledgement' section, which includes a list of terms and conditions. A red arrow points to the 'MARK AS COMPLETE' button at the bottom right of the form. The button is green and stands out among the other navigation buttons.

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

The screenshot shows the 'CFA Program Student Scholarship Application Form' on the CFA Institute website. The form is titled 'CFA Program Student Scholarship Application Form' and includes a section for 'Applicant Acknowledgement'. A red arrow points to the green 'SUBMIT' button at the bottom of the form. The form also displays a 'Back to application' link, a progress bar indicating '1 of 1 tasks complete', and a 'Last edited' timestamp of 'Aug 28 2020 09:54 PM (EDT)'. The 'SUBMIT' button is highlighted with a red arrow.

11. You must confirm your submission once more by clicking the green 'Submit' button.

The screenshot shows the same 'CFA Program Student Scholarship Application Form' as in the previous image, but with a 'Submit application' dialog box open in the foreground. The dialog box contains the text: 'Please confirm submission of your application. If you wish to take a look at the application before submitting, please Review it.' At the bottom of the dialog box, there are three buttons: 'CANCEL', 'REVIEW', and 'SUBMIT'. A red arrow points to the green 'SUBMIT' button. The background form is dimmed, showing the same 'Back to application' link, progress bar, and 'Last edited' timestamp.

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.

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 2026.** 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.

Please [contact us](#) if you have any questions about your scholarship submission.

Can I edit my application after I submit it?

Once you have submitted your application you are no longer able to make edits.

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



CFA Institute

University Affiliation
Program

Congratulations! You have been awarded a CFA® Program Student Scholarship. The Student Scholarship waives the one-time enrollment fee (if applicable) and discounts the exam registration fee to USD 600 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 additional cost will be added on to your scholarship award 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 scholarship discount is valid for one of the following exam offerings, depending on your level:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

Click [here](#) to register/enroll for the exam of your choice, prior to the registration deadline. 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



CFA Institute

University Affiliation
Program

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 one of the following exam offerings, depending on your level:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

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. 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 you have already registered and attempt to apply your submission will be declined and you will immediately receive the below email.



CFA Institute

University Affiliation
Program

Our records indicate that you have registered for an exam prior to the completion of a review of your application. As a result 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.

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.



CFA Institute

University Affiliation
Program

Our records indicate that you have registered for an exam prior to the completion of a review of your application. As a result 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.

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.