

# APPLICATION

## CFASR/CFA INSTITUTE CFA® SCHOLARSHIP PROGRAM – 2009

The CFA Institute is offering scholarships for the June 2009 Chartered Financial Analyst® (CFA®) Exam. The CFA Society of Rochester (CFASR) may award up to ten (10) scholarships. Society scholars must fulfill all CFA candidate requirements to register.

### **Candidate Cost:**

This scholarship will waive the enrollment fee and all but US\$220.00 of the registration fee. Exam registration fee for 2009 CFA exams also includes the complete curriculum and one sample exam. Scholarship recipients that have already registered for the exam will be reimbursed less \$220.

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### **Complete the following (please print):**

Name (First, Middle, Last): \_\_\_\_\_

CFA Institute Identification No.: \_\_\_\_\_

Registration Level: (circle one)    I    II    III

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Have you registered for the June 2009 CFA exam? [  ] Yes [  ] No    Date Registration Mailed: \_\_\_\_\_

Are you a member of a CFA Institute Society or Chapter? [  ] Yes [  ] No

    If yes, give name: \_\_\_\_\_

Are you employed? [  ] Part-time [  ] Full-time    Name of employer: \_\_\_\_\_

    Address of employer: \_\_\_\_\_

    Occupation: \_\_\_\_\_

    Will your employer reimburse CFA expenses? [  ] Yes [  ] No

Are you a student? [  ] Part-time [  ] Full-time    Level of school completed: \_\_\_\_\_

    Name of undergraduate college or university: \_\_\_\_\_

    Name of graduate college or university: \_\_\_\_\_

    Highest degree held: \_\_\_\_\_

    If no degree is held, when do you expect to receive your degree? \_\_\_\_\_

    Current field of study: \_\_\_\_\_

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**Please complete the questions on the reverse side of this form**



**June 2009**  
**CFA® Exam Scholarship Application**

The CFA Institute is currently offering scholarships for the June 2009 CFA Exam. The CFA Society of Rochester (CFASR) may award up to ten (10) scholarships. Each scholarship waives the entire enrollment fee and all but \$220 of the registration fee. Note that the registration fee also includes the complete curriculum and one sample exam.

CFASR membership is not required, though members will receive preferential treatment. Scholarships will be awarded on a merit basis only. Applicants employed at companies that reimburse CFA exam expenses are ineligible for this scholarship.

**Applicants must meet the following criteria:**

- Meet all qualifications for registration as a CFA candidate, including either holder of a bachelor's degree (or equivalent) or in your final year of bachelors degree program at the time of registration;
- Live or attend a college or university within 200 miles of the Society;
- Complete the enclosed application.

**Along with the completed application, you must also include:**

- Current resume
- Most recent college transcript
- You may also include other information that may be helpful to the society.

**Applications may be submitted by:**

**Fax:** 585.218.0338  
Attention: Priscilla Baker Jones

**Mail: Occam Capital Management, LLC**  
Attention Priscilla Baker Jones  
1303 Marsh Road  
Pittsford, NY 14534

**Drop-off** at the address above

**Completed applications must be received by 5:00 PM EST on December 22, 2008.**

**Questions?** Contact Priscilla Baker Jones at [pbakerjones@occamcapital.com](mailto:pbakerjones@occamcapital.com) or 585.218.0310.

**Please Note:** The CFA Society of Rochester strongly recommends that candidates register for the exam at their earliest convenience. CFASR is not responsible for the higher registration and enrollment fee a candidate must pay if he/she is not awarded a scholarship. Scholarships are not awarded to the immediate family of officers, directors, or committee chairs of CFASR or to society employees or their immediate families.