

CFA INSTITUTE SOCIETY CFA® SCHOLARSHIP VERIFICATION FORM—DECEMBER 2009

Please be sure that you and your sponsoring society complete the information below and sign where indicated.

Submit this form to: CFA Institute Scholarship Office
560 Ray C. Hunt Drive, Charlottesville, VA 22903-0668 USA
Or fax to 434-951-5290, Attention: Scholarships

Once your scholarship has been approved, you will receive instructions for registering for the CFA Exam if you have not already done so.

DEADLINE: 1 September 2009
SCHOLARSHIP FEE: US\$220*

December 2009 Exam

Registration Level I

Print legibly or type. Complete all sections.

CFA Institute Identification Number: _____ (previously enrolled candidates only)

Prefix (check one): Mr. Miss Ms. Mrs. Dr. Prof. Rev. Hon.

Print Name: _____

First (Given) Name Middle Name/Initial Last Name (Surname)

Mailing Address: _____

City: _____ State/Province: _____ Zip: _____

Country: _____ Telephone _____ / _____ / _____
Country Code Area/City Code Local Number

Fax: _____ Email: _____

Signature: _____

Refunds (if applicable) will be processed in the same manner in which the original payment was made.

Society must complete this section before submission to CFA Institute:

PLEASE ATTACH A COVER MEMO INCLUDING THE NAMES OF SCHOLARSHIP RECIPIENTS

Society Name: _____

Society Officer/Staffed Office Executive Position

Society Officer/Staffed Office Executive ID No.

Society Officer/Staffed Office Executive Name

Society Officer/Staffed Office Executive Signature

Phone Number

Email Address

This scholarship was donated by the _____ Society

OFFICE USE ONLY: Prepaid Will register online Refund due Offer Code: SCH _____

Authorization _____ Date: _____

*For the current exam offering, the CFA Program enrollment fee (if applicable) is waived and the registration fee is discounted. Scholarship recipients pay only the cost of curriculum (\$220) plus any applicable taxes and import duties. Curriculum discounts apply for returning candidates. Scholarships cannot be deferred to another exam offering.

CFA SOCIETY OF SACRAMENTO

DECEMBER 2009 CFA EXAM SCHOLARSHIP APPLICATION QUESTIONNAIRE

ON A SEPARATELY ATTACHED DOCUMENT, PLEASE PROVIDE US WITH THE FOLLOWING INFORMATION:

1. At what firm are you currently employed (or at which school are you currently enrolled)?
2. Please list your undergraduate institution, major, and GPA.
3. Please list any additional advanced degrees you have obtained and from which institution.
4. Why do you want to become a CFA Charterholder?
5. Have you taken this level of the exam in the past (i.e. are you retaking this level)?
6. Are you a member of the CFA Society of Sacramento, or another CFA Society?
7. Briefly describe your involvement in activities and organizations.
8. What type of career path would you like to pursue?
9. Please list any work experience (and the tenure) that would qualify towards your CFA work experience requirements.
10. Briefly describe your financial need for this scholarship.
11. For the Society's Education planning purposes, please tell us if you are currently using, or planning to use, any third-party CFA preparation material or courses to help study for the exam (e.g. Kaplan Schweser or Stalla).

Thank you for your application for the CFA Scholarship.