

CFA SOCIETY OF SACRAMENTO

December 2012 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).

Answers to this questionnaire, along with your CFAI Verification Form, are due back to the society by **Wednesday August 29, 2012**. Thank you for your application for the CFA Scholarship.

CFA[®] Institute Society Scholarship Verification Form – December 2012 Level I Exam

This form must be submitted no later than **01 September 2012**. Please complete the candidate information section below and sign where indicated. Once your scholarship has been processed and approved by CFA Institute, you will receive further instructions by email within four (4) weeks. **A valid international travel passport is required for CFA Program enrollment/registration.** Candidates **must** return this form to their local society.

SCHOLARSHIP FEE: US\$250 eBook only

US\$310 Print only

US\$340 eBook and Print

Candidate Completes Following

Complete Candidate Section by typing into the editable form fields

CFA Institute ID Number: _____ (if applicable) **Date of Birth** (d/m/yr): ____ / ____ / ____

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

First (Given) Name: _____ *Important: your name on CFA*

Middle Name/Initial: _____ *Institute records must be the same*

Last Name (Surname): _____ *as the name on your passport.*

Mailing Address: _____

Telephone: _____ / _____ / _____

Country Code

Area/City Code

Local Number

Email Address: _____

Email address must be legible to allow receipt of important communications

Candidate Signature: _____

(Date)

Society Leader Completes Following

Society Name: _____

Full Name and Position: _____

CFA Institute ID Number: _____

Email Address: _____

Telephone: _____ / _____ / _____

Country Code

Area/City Code

Local Number

Signature: _____

(Date)

Societies return the completed form to Society Relations:

- Americas and EMEA Regions: email to societyrelations@cfainstitute.org or fax to +1 (434) 951-5322
- Asia Pacific North Region: email to sonia.cheung@cfainstitute.org or fax to +852 2868 9912
- Asia Pacific South Region: email to jennifer.shum@cfainstitute.org or fax to +852 2868 9912

Plan early! CFA Institute will not accept forms received after 1 September 2012.

For the current exam offering, the CFA Program enrollment fee (if applicable) is waived. Scholarship applicants pay a discounted registration fee along with curriculum and shipping costs plus any applicable taxes and import duties. Scholarships cannot be deferred to another exam offering.

Office Use Only: Prepaid Will register online Refund due Offer Code: SCH _____

Date: _____ Authorization: _____