

## CFP® Scholarship Program 2026

The Financial Planning Association of Wisconsin exists to promote the financial planning process and advance the financial planning profession. The Scholarship Program provides financial assistance to Individuals pursuing the Certified Financial Planner™ certification through reimbursement of a CFP® review program.

To qualify for this Scholarship, you must:

- Be a current Wisconsin resident
- Show proof of purchase of a CFP® review program
- Not have been previously awarded this Scholarship
- Not be eligible for CFP® review course reimbursement by your employer
- The scholarship will be awarded at the 2026 Financial Planning Symposium. While the recipient is not required to attend, it is highly encouraged. If the winner is able to attend, FPA of Wisconsin will cover the cost of the Financial Planning Symposium.

**This \$825 Scholarship will be awarded once in 2026, at the 2026 Financial Planning Symposium which will be held at The Osthoff Resort & Spa in Elkhart Lake on September 29 – September 30.**

### **Application Deadlines & Important Dates:**

Application Due to FPA  
August 3, 2026

Winner Will Be Notified  
August 18, 2026

### **To be considered for the Scholarship, submit the following:**

- The completed application form (at the end of this document) with your signature
- Proof of enrollment in a CFP® review program
- Reference Form from a person who is not a relative. (See Reference Form at the end of this document) Reference forms must be submitted directly to FPA of Wisconsin by the person submitting the reference on behalf of the applicant.

Scholarship determination is at the sole discretion of the FPA of Wisconsin's Career Development Committee with approval of the Board of Directors. All Scholarship decisions are final. Scholarship award is not contingent upon earning a passing score on the CFP® Exam. Scholarship funds will be disbursed directly to the winner. Winners will be notified by email, and awards will be presented at the 2026 Financial Planning Symposium in Elkhart Lake. Attendance is not required, but highly encouraged, FPA of Wisconsin will cover the cost of the event.

Questions? Call Tyler McConville at 608-347-3721 or Brenda Matthias at 608-246-9001.

Email required materials by the Application deadline listed above to: Tyler McConville at [careerdevelopment@fpawi.org](mailto:careerdevelopment@fpawi.org).



Application for Scholarship

Important Submission Date:  
August 3, 2026

Full Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Email \_\_\_\_\_

Employer \_\_\_\_\_

Position \_\_\_\_\_

Name of School or Company Enrolled in for CFP® Certification Program/Review Class (please include enrollment confirmation).  
\_\_\_\_\_

Scheduled / Anticipated CFP® Exam Date \_\_\_\_\_

Are you currently a member of the FPA of Wisconsin? \_\_\_\_\_

Would you like to hear about the benefits of joining your local chapter of FPA? \_\_\_\_\_

Why are you pursuing the CFP® Certification?  
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What are your career goals and your plans to pursue them?

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List the name of one person who will provide a reference for you and their relationship to you (colleague, instructor, manager or FPA officer).

Name 

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Relationship 

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Phone 

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Applicant Signature

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Date

Questions? Call Tyler McConville at 608-347-3721 or Brenda Matthias at 608-246-9001.



## Reference Form

To Applicant: Provide this form to the person supplying a reference.

\_\_\_\_\_ is applying for a scholarship from the FPA of Wisconsin.

Please answer the following:

1. How long and in what capacity have you known the above individual?

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2. Please describe what attributes this individual has to successfully pursue his/her education and career goals.

[illegible]

3. Please list your name, address, and phone number.

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Please email your reference letter directly to the FPA of Wisconsin by the dates listed below. Do NOT return it to applicant. Thank you.

**Due Date:**  
**August 3, 2026**

Email required to: Tyler McConville at [careerdevelopment@fpawi.org](mailto:careerdevelopment@fpawi.org)