



SCHOLARSHIP APPLICATION

Mr. Mrs. Ms. Miss

Primary Mailing Address: Business Home

Last Name: First Name: Middle Initial:

Title: Business Name:

Business Address:

City/State or Province: Zip/Postal Code: Country:

Business Phone: Cell Phone:

Business Fax: Business E-mail:

Home Address:

City/State or Province: Zip/Postal Code: Country:

Home Phone: Personal E-mail:

DEMOGRAPHICS (required)

How did you hear about this scholarship program?

- Advertisement
E-mail Promotion
Personal Referral
Attended Workshop, Conference or On-Demand event (please specify)

Year of birth:

Gender:

- Male
Female
Non-binary

Current number of clients you are advising:

Do you qualify for disability?

- Yes
No

Your firm affiliation:

- National Wire House
Regional Broker Dealer
Registered Investment Advisor
Bank/Trust
National/Regional Independent
Investment Management Wholesaler
Industry Service Provider
Other

Do you qualify as a veteran?

- Yes
No

Years of experience:

- 1-2 years
3-4 years
5-10 years
11+ years

Ethnicity:

- American Indian or Alaskan Native
Asian
Black or African American
Hispanic or Latino
Native Hawaiian or Pacific Islander
White (non Hispanic)
Other

Investments & Wealth Institute does not discriminate on account of race, color, religion, national origin, citizenship status, ancestry, age, sex (including sexual harassment), sexual orientation, marital status, physical or mental disability, military status or unfavorable discharge from military service.

WHICH SCHOLARSHIP FUND ARE YOU APPLYING FOR

- IWI Diversity
Female Advisor (Women in Wealth)
RIA Center for Excellence
Advisor in Transition

Are you seeking financial reimbursement from your firm?

- Yes No

If so, how much? \$

DESIGNATION SELECTION

Which designation are you seeking?

- Certified Investment Management Analyst (CIMA)
Certified Private Wealth Advisor (CPWA)
Retirement Management Advisor (RMA)

Please indicate the education firm & class date you are interested in:



ACKNOWLEDGMENTS

All applicants must have at least three years’ experience in financial services, meet the qualification requirements of the certification program for which they are applying and demonstrate professional, volunteer, or civic/community leadership experience and be committed to fully engage in all scholarship benefits.

To qualify as an applicant, you must acknowledge by initialing the following statements:

I have reviewed the CIMA®, CPWA®, RMA® designation pre-requisites, and to the best of my knowledge meet all the qualifications _____
I understand the allocation of scholarship funds is subject to my background check _____

If scholarship funds are awarded:
I agree to pay applicable program fees _____
I understand I must enroll in a program within 6 months of scholarship acceptance _____
I will maintain my membership status with Investments & Wealth Institute for 3 years _____

QUALIFYING QUESTION

Describe why achieving an advanced certification is important to you? (Include any professional achievement and community service.)

Disclaimers:

- Qualified individuals who can demonstrate financial need and/or are from underrepresented populations related to gender, race, ethnicity, age, veteran, or disability status may receive scholarship assistance underwriting the costs of CIMA, CPWA and RMA certification. Scholarships may aid in offsetting the cost of the certification program but will not offset the full cost of the program.
- To be eligible for the RIA Center of Excellence scholarship an individual must be an age of 40 or below who is associated with an independent Registered Investment Advisor (either as an employee or independent contractor) and who’s educational and training efforts are not being supported by a firm.
- For a limited time: to be eligible for the Advisor in Transition scholarship an individual must demonstrate financial hardship as a result of employment status change from employed to unemployed in 2020 and/or whose health has been affected by COVID-19.
- Application for a scholarship does not guarantee that a scholarship award will be granted or that the applicant will be accepted into the certification program.
- For CIMA candidates registering for Chicago Booth, Wharton or Yale SOM CIMA programs—scholarship recipients must apply online to their school of choice first then be reimbursed by Investments & Wealth Institute upon class registration confirmed with the school.
- Scholarship funds are not eligible to be used for private class offerings, transfer/cancellation fees, retake fees, or initial certification fees.
- Scholarships will be awarded as funding allows, and all scholarship decisions made by Investments & Wealth Institute are final. All scholarships are limited in availability. Award amounts may vary.

Submission:

E-mail—Complete this form electronically and submit to scholarships@i-w.org or use the “Submit” button to the right.

Mail—Mail your completed scholarship form to: Investments & Wealth Institute, 5619 DTC Parkway, Suite 500, Greenwood Village, CO 80111.

Fax—Fax your completed scholarship form to Investments & Wealth Institute at +1 303-770-1812.