



FAX No. (949) 824-1547
www.unex.uci.edu

P.O. BOX 6050
IRVINE, CALIFORNIA 92616-6050

Orange County Society -FPA Scholarship Award University of California Irvine, Extension Personal Financial Planning Certificate Program

UC Irvine Extension is a non-profit organization, totally supported by course fees and receives no state or federal funding. For this reason, we do not participate in a federally funded Financial Aid program. Scholarship funds have been donated to UC Irvine Extension by the Orange County chapter of the FPA and will be distributed based on the established evaluation criteria. The one time maximum award of \$600.00 must be used to cover registration fees. The scholarship is offered in the Fall and Spring quarters.

Procedures for Submitting Application

1. Complete the application form--do not leave any blanks.
2. Please be thorough in your explanation of why you are requesting this scholarship by submitting the supporting documents.
 - a. *Personal statement written by the student (should address, in detail, all the evaluation criteria described below).*
 - b. *Any other documents (such as transcripts and or/resume) deemed necessary by the student to demonstrate academic standing and commitment to educational goals.*

Evaluation Criteria

Your application must stand on its own merit. Be sure that your completed application provides sufficient information to enable UC Irvine Extension and an appointed committee to make a final decision. The following criteria should be addressed:

1. Importance of the scholarship in meeting your educational goals.
2. Your understanding of the field of Financial Planning.
3. Your standing and prior commitment to educational goals.
4. Your membership status with the FPA or Society of Financial Services Professionals.
5. Quarter in which you plan to begin your study (Spring or Fall).

Application Form

NAME: FIRST MI LAST

HOME ADDRESS:

CITY: STATE: ZIP:

PHONE: DAY EVENING

FAX:

E-MAIL:

SOCIAL SECURITY OR STUDENT ID:

Please attach a personal statement explaining your situation along with any supporting documents necessary and return the **Personal Statement** and **Application Form** 4 weeks prior to the start of the Fall and Spring quarters. Please submit via mail, fax or email to the address below.

**UC Irvine Extension
Law, Finance and Business
Personal Financial Planning Scholarship Committee
P.O. Box 6050
Irvine, CA 92616-6050
(949) 824-1547 Fax
fberg@uci.edu**

Applications will be reviewed by the Personal Financial Planning Scholarship Committee. Awardees will be contacted two weeks prior to the start of Fall and Spring quarters.

I certify that this application and supporting documents are accurate and I authorize UC Irvine Extension to make inquires and verify all statements on this application. I understand any falsification of material facts will result in the application being rejected.

Signature of Applicant

Date

Social Security Number. Your Social Security number is requested by authority of the Regents of the University of California to verify your identity for accurate record keeping. Providing the number is voluntary.

Privacy Notification. The State of California Information Practices Act of 1977 requires the University to provide the following information to individuals who are asked to supply information about themselves. All information requested on the application form, with the exception of the social security number, is required for processing the scholarship form.

For Office Use Only: Date of Application Received: Date Forwarded for Review: Action Taken: Comments:

**UC IRVINE EXTENSION/OCFPA SCHOLARSHIP
PERSONAL FINANCIAL PLANNING SCHOLARSHIP PROGRAMS**

Policies and Procedures

The following are policies and procedures for scholarships in the Personal Financial Planning Certificate Program. PLEASE READ CAREFULLY. Failing to adhere to these policies may result in disqualification of your scholarship.

1. Names of all scholarship recipients are placed on file in the UC Irvine Extension Office.
2.
 - a. Awardees are required to officially enroll in the Personal Financial Planning Program by filing a nonrefundable application fee of \$125.00.
 - b. Awardees are required to enroll in a course the quarter following notification of acceptance.
 - c. Funds are not retroactive and do not apply to courses taken in previous quarters.
 - d. The UC Irvine Extension PFP scholarship program will fund course fees. This scholarship is not a cash award; any unused monies are returned to the scholarship fund and are not paid out to the scholarship recipient.
3. Scholarship recipients are responsible for registering for individual courses. Please email Christine Stadelmann at cstadelm@uci.edu to register.
4. All courses must be taken for a letter grade. Students must earn a "B" or better in all courses. Pass/No Pass is not acceptable. Notices of discontinuance will be sent if grades are not acceptable.
5. A grade of incomplete (I) received in any class will forfeit course fees.
6. Withdrawal and refund policies as stated in the UNEX catalog will be observed.
7. If awardee is unable to enroll in a course for two quarters in a row, scholarship recipients should notify Francine Berg in writing at UCI Extension, P.O. Box 6050, Irvine, CA 92616-6050 or through e-mail at fberg@uci.edu. Failure to do so may result in disqualification.
8. The scholarships apply to Personal Financial Planning Certificate Program courses only, as stated in curriculum information in brochure.
9. Scholarship monies are intended for **course fees only**.