



AFCPE
79 S. State Street, Suite D3
Westerville, OH 43081
Phone: 614-368-1055

2025 AFCPE® Symposium Knowledge Bowl Guideline

Objective

The objective of the AFCPE® Knowledge Bowl is to promote the field of financial counseling and create a unique opportunity to involve university students in the AFCPE Symposium. This annual event highlights the core competency domains of AFC® professionals and the important role that students play in the future of the financial counseling profession.

Overview

The 2025 AFCPE Financial Counseling Knowledge Bowl will be held during the 2025 AFCPE Annual Research and Training Symposium November 18- 20 in Phoenix-Glendale, AZ. Teams will compete in a gameshow-style competition. Questions presented are designed to be in a similar format to those found on the AFC® exam, though they may not be identical. The team with the most points at the end of the competition will win first place, followed by subsequent teams in descending order of points to determine second place, and so forth.

Eligibility

All full-time, undergraduate or graduate-level, students who:

- have not yet taken the AFC exam
- have a strong interest in the field of personal finance, financial counseling, and the pursuit of the AFC certification
- have not previously participated in the AFCPE Knowledge Bowl competition

Team Composition

Teams may consist of up to four full-time students (3 primary and 1 alternate).

- Only one team member substitution is permitted.
- The team must be accompanied by a faculty or staff advisor.
- Only one team per institution.



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Benefits

Benefits	Student	Advisor
AFCPE® Membership for 1 year	√	√
Registration for the AFCPE® Symposium	√	√
1-night stay at the Symposium hotel	√	√
Up to 45 experience hours towards the AFC	√	
Scholarship to obtain your AFC® (includes 1 exam attempt)	√	
Access to the AFC® Study Guide to prepare for the competition	√	√
\$500 cash prize for first-place winners	√	
2025 Knowledge Bowl Ambassador (KBA)title privileges for first-place winners	√	

KBA title privileges include but are not limited to recognition at the AFCPE Symposium, special mention on the AFCPE website, and opportunities to represent AFCPE throughout the year.

Application Process

Submit a completed team application on, or before, **April 30, 2025 (11:59 pm ET)**.

All applications must be submitted [online](#) and must include:

- Team Information
- Team Video
- Team Field Question
- Acknowledgement

Team Information:

- Name, contact information, and headshot for each team member.
- Name, contact information, and headshot for the faculty/staff advisor.
- A copy of each team member's unofficial transcript.

Team Video:

- Submit a video with responses to the following:
- Introduction of each team member. Some ideas for introductions are:
 - Current degree program and projected graduation date.
 - How did you become interested in this area of study?
 - Describe future educational and/or career goals.
 - How is your passion for the field of financial counseling/planning/education visible to others?
 - What do you know now that you wish you had known when you started school?
 - Favorite personal finance topic or class taken in your degree program and why?
 - What current events or personal experiences have highlighted the importance of the financial counseling/education profession?
 - Why does your team want to compete in the Knowledge Bowl?
 - How did you hear about the AFC designation?
 - When do you plan to sit for the AFC exam?
 - How will the AFC benefit your career and those you serve?

Video Guidelines:

- The video may be up to 10 minutes long.
- Please ensure the sound is clear and avoid the use of programs that run promotional banners that may distract reviewers from your video.
- Videos must be submitted in a format that all selection committee members can readily view without needing specialized software.
- Please house large, media-rich files on a server and provide a web link in the application.
- The team advisor may consult with their team on the video and provide support, but the work should be done by the students.
- Note: Clips from the videos will be shown at the AFCPE Symposium, so show your school spirit and have fun with it!

Team Field Question Rules/Guidelines:

- Each team must choose one of the following scenarios and submit one group response to the Field Question.
- Responses to the Field Question should be the exclusive work of the students.
- Students should not seek or accept help from their faculty/staff advisor, professors, professionals in the field, other students not on the team, or other third parties in preparing the response to the Field Question.
- Please submit the team response in a Word document, double-spaced. In 500 words or less share how you would counsel the client. Be sure to include at least (3) financial counseling skills, resources, and or information you will use the process.

Field Question Options:**Option 1**

Jacque and Diane are coming to see you because they are struggling financially. They are a family of six, living off Jacque's income, as Diane left the workforce nearly a decade ago to care for their four children, ages 2 through 8. Jacque's company is not doing well, and although he still has his job, his pay has been stagnant for several years. They've had to deplete their savings to make ends meet, as their living expenses have increased with the growing size of their family. Diane has been looking for work, but she's been out of the workforce for long enough that she's not qualified for jobs that pay enough to cover the cost of childcare for the children who are too young for school.

A week before your second session, a massive storm with record rainfall caused major flooding in Jacque and Diane's neighborhood. They come to the session in a panic. Because their house was not in a flood zone, Jacque and Diane didn't have flood insurance. On top of that, the deductible for their homeowner's insurance is so high that they can't afford their portion of repairs that would have otherwise been covered, including hail damage to the roof.

While the house is technically habitable, there is extensive water damage to the floors and walls, their appliances all need to be replaced, and most of their personal belongings had to be thrown out. Mold has already starting to grow on the walls, and the children are getting sick. Jacque's company has been understanding so far, but he was already worried about the security of his job, and the additional stress is seriously impacting his performance. They are exhausted, scared, and don't know what to do. How can you help?

Option 2

Kiarra has always been a dedicated and hard-working person. After her partner passed away a few years ago, she worked her way through law school and now has her dream job as a dedicated pro-bono attorney at a large legal firm. This job allows her to make a real difference in the lives of her clients, earn a salary that meets the needs of her two children (ages 6 and 7), cover her substantial student loan payments and allows her to save for the future.

The downside of her job is the long hours. Kiarra's mother, Jolene, moved in with the family to help watch the children while Kiarra was in school. Although Kiarra can now afford childcare, she cherishes the time her children spend with their grandmother after school.

It has been a few years since you last saw Kiarra, and you are surprised when she calls to schedule an appointment. When she arrives, it's clear she is under a lot of stress. She struggles to remain composed as she tells you that Jolene was recently diagnosed with early-onset dementia.

Jolene will soon be unable to care for the children, and eventually, she will need a level of care that Kiarra cannot provide.

Kiarra seeks your help to find resources, both financially and emotionally. Her salary is good but adding childcare and in-home nursing assistance will be a strain. She hates the idea of her children spending most of their day without family interaction, but she cannot reduce her work hours. She loves her job and is devastated at the thought of quitting for a position with fewer hours, which would likely come with a pay cut.

There is no extended family for Kiarra to turn to, and she is worried about how her mother's illness will impact her children. To make matters worse, there is no clear timeline for the disease progression – Jolene might be okay for years, or she could decline very quickly. How can you help Kiarra? How might you counsel her?

Selection Process

Up to three (3) teams will be selected to participate in the 2025 AFCPE Knowledge Bowl.

- Applications will be reviewed by members of AFCPE who have no affiliation with any of the university teams submitting for the competition.
- Both video and field question responses will be evaluated and scored on a 1-5 scale using the criteria below.
- Please note: the content/message of the video is more important than professional quality.

Video Review Criteria

1. Clarity

- The video should have clear visuals, professional attire, and good audio quality. The final product should be polished and well-thought-out.

2. Importance of the AFC®

- Teams should clearly explain the significance of the AFC® designation and its impact on their career goals.

3. Relevance

- The video should cover:
 - Introduction of each team member.
 - Why the team wants to compete in the Knowledge Bowl.
 - How the AFC® designation benefits their career and the people they serve.

4. Connection to AFCPE®

- The video should show how the team aligns with the mission, values, and goals of AFCPE®.

5. Creativity

- The video should be engaging and stand out in its presentation.

6. Perceived Opportunity

- The video should reflect a genuine interest in competing in the Knowledge Bowl and how the AFC® certification supports long-term career goals.

Field Question Criteria

1. Accuracy

- The response should accurately reflect financial counseling principles and align with industry standards.

2. Holistic Approach

- The response should take into account the client's financial situation, considering both short-term and long-term goals to create a well-rounded comprehensive plan.

3. Awareness of Financial Issues

- The response should demonstrate a strong understanding of the relevant financial challenges and the broader factors that may impact the client.

4. Critical Thinking

- The response should show thoughtful analysis, evaluating various strategies and their potential outcomes.

5. Quality of Solution

- The response should present practical, well-considered solutions that are tailored to the client's unique needs.

6. Creativity

- The response should suggest innovative, practical, and effective solutions to address the client's financial challenges.

Selected teams will be notified on **June 3, 2025**, via email.

Questions:

Questions about the Knowledge Bowl and/or the Knowledge Bowl application process may be directed to Valerie Richards (Education Programs Manager) at education@afcpe.org or at (614) 368-1055.