



79 S. State Street, Suite D3
Westerville, OH 43081

Phone: 614.368.1055

www.afcpe.org

2025 AFCPE Symposium Scholarships

Thanks to generous donations AFCPE can provide Symposium Scholarships to cover the cost of in person registration at the AFCPE Symposium in Phoenix-Glendale, Arizona on November 18-20.

Eligibility

To be eligible for a Symposium Scholarship applicants must be ONE of the following:

- First Time Attendee
- Student (full - time or part- time)
- Financial Coach or Financial Counselor or Educator serving or committed to serving a Community Based Organization
- Financial Coach or Financial Counselor or Educator serving or committed to serving the military community
- Current or graduated FINRA Foundation Fellow
- Coast Guard Spouse, Coast Guard Veteran
- Experiencing a financial hardship that would otherwise present in-person attendance

And must not

- Receive any organization support or reimbursement to attend Symposium
- Be registered for Symposium at the time of application award and acceptance
- Have not received, accepted or utilized a Symposium scholarship award in the past twelve (12) months.

Application Questions:

1. Employment and Professional areas of work
2. Identify additional certifications you as an applicant currently hold in good standing.
3. Demographic information



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4. Student status (transcripts will be required)
5. Will this be the first time you have attended the AFCPE Symposium?
6. Have you previously received a scholarship to attend Symposium?
7. Are you a current AFCPE Member (Membership does not impact scholarship eligibility).

Current or Graduated FINRA Fellows will be required to answer the following application questions:

1. Are you a FINRA Foundation Fellow?
2. Are you a Registered Investment Advisor/Professional?
3. Please note: FINRA Foundation Military Spouse Fellows who are also registered investment advisors/professionals are no longer eligible to receive a FINRA Foundation scholarship to attend the AFCPE Annual Symposium. Applicant must acknowledge understanding of the above statement.

Military Connected Counselors will be required to answer the following application questions:

1. Are you currently providing financial counseling or education services to service members and their families?
2. Please indicate the branch(es) for which you are currently providing financial counseling or education.
3. Please tell us the name of the military installation where you work or the name of the community where you assist Guard or Reserve Members. (Optional)
4. Please indicate the capacity in which you serve as a military financial counselor.

3 Essay Questions

Each Essay has a 250-word maximum for each essay answer.

1. How would receiving an AFCPE Symposium Scholarship help you better support those you serve and advance your work and as a financial professional? Please share specific examples of how this opportunity could positively impact your clients, organization or community.
2. What specific goal(s) do you hope to achieve by attending the 2025 Symposium? This could include something you hope to learn, a skill you want to



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enhance, or a connection you hope to make that will benefit your career and the clients you serve.

3. (Optional) How do you plan to share the knowledge or insights you gain from Symposium with others in your community or organization? If awarded the scholarship, how will you “pay it forward” to maximize its impact?