



CTP and FP&A Exam Scholarship Application Form

FISCAL 2016 – 2017

Drawing: September 14, 2016

Submission Deadline: September 7, 2016



Certified
Treasury
Professional®



FP&A®

Certified Corporate
**Financial Planning &
Analysis** Professional

SCHOLARSHIP CONTACT:

For those interested in being considered for the drawing, please e-mail president@afpwny.org with the Subject of the E-mail: **CTP/FP&A Scholarship**.

Please attach this AFPWNY CTP or FP&A Scholarship Application Form (see at the bottom for the Applicant to complete).

BACKGROUND:

AFPWNY CTP and FP&A EXAM PREPARATION SCHOLARSHIP:

The primary objective of the Association for Financial Professionals of Western New York is to promote education, communication and enhanced recognition of the treasury management, financial planning and analysis as well as the finance professions. In support of this goal, the Association for Financial Professionals of Western New York has established a scholarship program to assist Members who are preparing for the **Certified Treasury Professional (CTP)** or the Certified Corporate **Financial Planning & Analysis** Professional (FP&A) Exam. The scholarship is available each fiscal year to

qualified candidates. The scholarship has been established to be funded each fiscal year in the amount of \$1,000.00 to:

(a) provide assistance towards preparing for the exam through AFP Learning Systems or other qualified preparatory education systems or programs geared towards preparing the student to successfully sit for the Exam and achieve CTP or the FP&A certification and/or

(b) cover the AFP cost to sit for the CTP or the FP&A certification exam.

With this scholarship, AFPWNY has taken another step towards recognizing that earning the CTP and/or the FP&A designation as valuable professional achievements, denoting the standard of excellence in treasury and financial planning and analysis.

CRITERIA:

It is AFPWNY's intent that the scholarship be awarded according to the following criteria:

1. Active Member of AFPWNY.
2. Commitment to sit for the Exam within a twelve (12) month period upon receipt of the scholarship (CTP Exam is offered bi-annually in the December/January and June/July time frames: the next FP&A Exam is offered August 1, 2016 – September 30, 2016).
3. There will be a random drawing each year at the September meeting, or other date, as determined by the Board of Directors. For those interested in being considered for the drawing, please e-mail president@afpwny.org with the Subject of the email: **CTP/FP&A Scholarship** no later than the date posted on the website and also sent in a notice to the Members.

SCHOLARSHIP TERMS AND CONDITIONS:

- The scholarship recipient will be notified via email, if they were not in attendance at the time of the drawing, and their name will be posted on The AFPWNY website. Recipient must sit for the exam within twelve (12) months of initially receiving the scholarship.
- This is a one-time, non-renewable scholarship. The scholarship will be paid to the recipient as a reimbursement of actual and verifiable expenses that that person made or to their employer, if the employer made the payments. The Exam Registration fees will not be reimbursed if the recipient does not pass the exam. If the first attempt fails, the recipient must retake the exam within twelve (12) months and pass it to be eligible for reimbursement of costs to register and take both exams. If the second attempt is also unsuccessful, no costs to register and take either exam will be reimbursed.
- Other reasonable fees required to prepare for the exam are eligible for reimbursement under this scholarship program. Fees incurred should tie directly and specifically to CTP or the FP&A certification. Course training and development should reflect materials authorized by AFP and based on the current CTP Body of Knowledge contained in the *Essentials of Treasury Management (Current) Edition* and the AFP

Learning System-Treasury or equivalent coursework or online curriculum. Exam preparation costs are immediately eligible for payment up to a maximum of \$800.00. The balance of \$200.00 (\$1,000.00 - \$800.00) is available to reimburse scholarship recipient for costs incurred to register and successfully pass the exam.

- Any travel and lodging expenses that may be incurred on the part of the recipient that: 1) exceed the twelve (12) month period; or 2) exceed the \$1,000.00 award amount; shall be the sole responsibility of the recipient.
- Scholarships must be used by the named recipient with a commitment to sit for the exam, within twelve (12) months of receipt, and may not be transferred to third parties for any reason. The exam is offered bi-annually in the December/January and June/July time frames.
- All decisions regarding the awarding of scholarships are at the sole discretion of the AFPWNY.
- One scholarship will be awarded per fiscal year. Applications will only be considered for a period of six (6) months. Applicants not awarded a scholarship within that time period must re-apply.

APPLICANT SHOULD COMPLETE THE FOLLOWING:

I would like to be considered for the AFPWNY CTP & FP&A Exam Scholarship and have reviewed and meet the minimum Scholarship Criteria noted in the preceding section and this application reflects my intent to pursue the CTP & FP&A Exam Scholarship for the Fiscal Year July 2016- June 2017. I also will abide by the Scholarship Terms and Conditions so stated in the preceding section.

Date: _____

Signature: _____

Name (Printed): _____

Employer (if applicable): _____

Phone Number: _____

e-mail Address: _____

Mailing Address: _____

Expected Exam Date: _____