

CHARTERED FINANCIAL ANALYST (CFA®) SCHOLARSHIP FOR UTA STUDENTS

Here are the top five CFA® charterholder roles:

TOP FIVE GLOBAL CHARTERHOLDER ROLES

JOB TITLES

- 1) Portfolio Manager
- 2) Research Analyst
- 3) Chief Level Executive
- 4) Consultant
- 5) Risk Manager

PRACTICE TYPES

- 1) Equities
- 2) Fixed Income
- 3) Private Equity
- 4) Derivatives
- 5) Real Estate

To find out the value of the CFA® charter and how to earn the charter, you can visit:

<https://www.cfainstitute.org/-/media/documents/factsheet/cbt-cfa-charter-factsheet.ashx>

Do you want to join the ranks of elite investment professionals? How much does it cost?

The exam registration fee is \$1,250. Plus, there is a one-time enrollment fee of \$350 the first time you register for the Level I exam. You can find more details about the CFA® exams at

<https://www.cfainstitute.org/en/programs/cfa/exam>

Students who receive the scholarship can save \$1,200 from the CFA®

exam fees! With the scholarship, students pay only \$400 for exam

registration, including access to the eBook curriculum. Plus, the program enrollment fee (\$350) is waived.

Who is eligible to apply?

- Senior and junior undergraduate students, masters and doctoral students in finance who are attending the University of Texas at Arlington.
- Overall GPA > 3.5 and GPA in finance, economics, statistics and accounting courses > 3.5.
- Visit <https://www.cfainstitute.org/en/programs/cfa/charter> for the CFA® program enrollment requirements.

How to apply?

If you are not enrolled in the CFA® Program, you must create a CFA Institute account to receive your login information and access the scholarship application. Candidates should (1) submit the application form on the CFA Institute website:

<https://www.cfainstitute.org/en/programs/cfa/scholarships/student>. This step-by-step guide details the steps necessary to submit a student scholarship application.

(2) email Professor Hao at Qhao@uta.edu. In the body of the email, please include:

- A short statement explaining why you deserve the scholarship. This statement should include what you hope to achieve by pursuing the CFA® charter, your career goals, and your academic achievements/performance including GPA information. Please clearly provide your overall GPA as well as the GPA on your finance, economics, statistics, and accounting courses.
- Please attach your unofficial transcript.
- Major(s) and expected graduation date.
- Any other information you believe will aid in the scholarship decision.

When is the application deadline?

September 30 annually.

What is the evaluation process and criteria?

Awards will be made based on a combination of factors including interest in and rationale for pursuing the CFA® charter, academic accomplishments, and other personal characteristics that indicate the applicant is a strong scholarship candidate. In addition, the applicant is required to agree to the following terms.

- Will not withdraw from the exam or have a no-show on the exam.
- Will email his/her CFA® exam results to Qhao@uta.edu

Any violation of the terms may negatively affect the CFA® scholarship award consideration for the applicant in the future.

Ready to take the exam within a year?

For more information visit <https://www.cfainstitute.org/programs/cfa>