

CHARTERED FINANCIAL ANALYST (CFA®) SCHOLARSHIP FOR UTA STUDENTS

What do employers say about hiring CFA® charterholders?

"You can hire people with an MBA, but you don't necessarily know that one MBA is the same as another MBA. If you hire investment professionals with a CFA [designation], you absolutely have confidence at the level of qualification."

--Jenny Johnson, Franklin Templeton, COO/President

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 ranges from \$700-\$1000, depending on how early/late you register. Plus, there is a one-time enrollment fee of \$450 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>

Good News though! You may be eligible for the CFA® Scholarship!

Students who receive the scholarship can save \$800-\$1,100 from the CFA® exam fees! With the scholarship, students pay only \$350 for exam registration, including access to the eBook curriculum. Plus, the program enrollment fee (\$450) is waived.

University Affiliation
Program



CFA Institute®

Who is eligible to apply?

- Senior undergraduate students, masters and doctoral students in finance who are attending the University of Texas at Arlington.
- Overall GPA > 3.0 and GPA in finance, economics, statistics and accounting courses > 3.0.
- 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?

Applications are considered on a rolling basis.

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>