

HER WEALTH® SCHOLARSHIP SUMMARY & APPLICATION

In recognition that women remain underrepresented in the financial services industry, The Colony Group (TCG) has established a Her Wealth® Scholarship. The scholarship goal is to pay it forward and to encourage future generations of women in the financial services industry.

Each year, TCG funds and awards a \$2,500 scholarship. The award will go to an eligible undergraduate woman entering her junior or senior year and studying to become a CFP®, CFA, or CPA.

The deadline for application is May 31, 2019.

HER WEALTH® SCHOLARSHIP SUMMARY

SCHOLARSHIP CRITERIA

Applicants must be:

- Women studying with a declared major in finance or accounting with the intention to obtain further designation as a CFP®, CFA, or CPA.
- College juniors or seniors who are enrolled in pursuit of a four-year bachelor's degree at an accredited college/university.
- Have a minimum grade point average of 3.5 (on a 4.0 scale).
- A US citizen or legal resident.

Students may receive the award for only one academic year.

SELECTION PROCESS

- Applications must be received by the deadline. Applications received after the deadline will not be considered.
- Applications are reviewed by a committee of Her Wealth® Senior Advisors as well as the Her Wealth® Advisory Board.
- Scholarship application forms and directions for completing the forms are attached at the end of this document.

APPLICATION REQUIREMENTS

- Complete the Her Wealth® Scholarship Application (included).
- An essay outlining why you have chosen a career in financial services (500 words or less). You may include any financial need in your essay.
- An official transcript sent from your college or university directly to The Colony Group that includes your undergraduate cumulative GPA, declared major and completed coursework.
- Resume including work history, relevant extracurricular activities, and demonstrated academic and/or professional accomplishments.

Awards will be announced and funds distributed directly to the academic institution for the 2019 Fall semester.

HER WEALTH® SCHOLARSHIP APPLICATION FORM

- **Receipt Deadline: May 31, 2019**
- Carefully review the Application Summary before completing application.
- Confine responses to allotted space, except where otherwise instructed.
- Review, sign and date the application.
- Incomplete applications or applications received after May 31 will not be considered.

Last Name: _____ First Name: _____ MI: _____

Permanent Address: _____

City: _____ State: _____ Zip: _____

Mobile phone: _____ Home Phone: _____

Email: _____

Date of Birth: _____

Age: _____

Name of College or University you are currently attending: _____

List names of any colleges you previously attended

Name of college

Dates attended

_____	_____
_____	_____
_____	_____
_____	_____

Declared major: _____

Degree you are pursuing: _____

Year of study in the Fall 2019 semester ☐ Junior ☐ Senior

Additional Certifications you are pursuing ☐ CFP ☐ CPA ☐ CFA ☐ Other: _____

ESSAY

Please tell us why you have chosen a career in financial services. (500 words or less)

RESUME

Please include a resume including your work history, relevant extracurricular activities and demonstrated academic and/or professional accomplishment.

OFFICIAL TRANSCRIPT

Please have your college or university mail your official transcript to us at the following address:

The Colony Group
Attn: Her Wealth Scholarship
7475 Wisconsin Ave
Suite 600
Bethesda, MD 20814

REQUIRED CERTIFICATION AND RELEASE OF INFORMATION (READ AND SIGN)

This certification must be signed and dated by the applicant to be considered for a scholarship.

I hereby certify that the information provided in this application packet is accurate and complete to the best of my knowledge.

I have read the Application Instructions and Requirements for the Her Wealth® Scholarship and meet all stated conditions of eligibility.

I understand that this application may not be considered unless all requested materials are enclosed and the application is signed, dated and received by The Colony Group – Her Wealth® no later than May 31st, 2019.

I understand that application is evaluated on the applicant's submissions, including application, essay, official transcript and resume. I understand that recipients are chosen at the complete discretion of the Her Wealth® Scholarship Committee and that Her Wealth® does not comment on the review panel's deliberations or on any particular applicant's status.

I understand that all applications will be held confidential and that no application material will be returned. I understand that Her Wealth® Scholarship funds cannot be used for expenses incurred before the period covered by the scholarship grant and that the scholarship grant will be paid directly to the college of university for tuition.

I understand that the scholarship recipient will be notified by email followed by written notification via mail. If I am not a scholarship recipient, I understand that I will be notified by mail only.

If selected to receive a Her Wealth® Scholarship, I give The Colony Group permission to release my name, institution, and photograph for promotional purposes. I understand that upon selection, information will be released to the press and may be placed on the Her Wealth® and The Colony Group websites.

Signature (required): _____

Date (required): _____