



SCHOLARSHIP APPLICATION

Mr. Mrs. Ms. Miss Primary Mailing Address: Business Home
Last Name: First Name: Middle Initial:
Title: Business Name:
Business Address:
City/State or Province: Zip/Postal Code: Country:
Business Phone: Cell Phone:
Business Fax: Business E-mail:
Home Address:
City/State or Province: Zip/Postal Code: Country:
Home Phone: Personal E-mail:

DEMOGRAPHICS (required)

How did you hear about this scholarship program?
Advertisement
E-mail Promotion
Personal Referral
Attended Workshop, Conference or On-Demand event
Year of birth:
Gender: Male Female Non-binary
Current number of clients you are advising:
Your firm affiliation: National Wire House Regional Broker Dealer Registered Investment Advisor Bank/Trust National/Regional Independent Investment Management Wholesaler Industry Service Provider Other
Do you qualify for disability? Yes No
Ethnicity: American Indian or Alaskan Native Asian Black or African American Hispanic or Latino Native Hawaiian or Pacific Islander White (non Hispanic) Other
Years of experience: 1-2 years 3-4 years 5-10 years 11+ years

Investments & Wealth Institute does not discriminate on account of race, color, religion, national origin, citizenship status, ancestry, age, sex (including sexual harassment), sexual orientation, marital status, physical or mental disability, military status or unfavorable discharge from military service.

WHICH SCHOLARSHIP FUND ARE YOU APPLYING FOR DESIGNATION SELECTION
IWI Diversity
Female Advisor (Women in Wealth)
RIA Center for Excellence
Which designation are you seeking?
Certified Investment Management Analyst (CIMA)
Certified Private Wealth Advisor (CPWA)
Retirement Management Advisor (RMA)
Are you seeking financial reimbursement from your firm?
If so, how much? \$

