Money Quotient®
BRINGING MONEY + LIFE INTO FOCUS™

Ken Gillaspie Legacy Fund

Composing Meaningful Conversations about Money and Life

2018 Scholarship Information

Funding for Money Quotient "Fundamentals of Financial Life Planning"
Training Course Fees and Related Travel Expenses

Background

Ken Gillaspie was a founding partner of Security First Advisors and an active member of the Money Quotient[1] community of life-centered, values-based, financial planning professionals. Our two organizations teamed up to create the Ken Gillaspie Legacy Fund to honor this special man in a way we think would please him very much. Ken understood the link between his personal and professional growth and his ability to effectively guide clients in a life planning process. He frequently commented to his colleagues that the tools and training developed by Money Quotient helped him to meet these objectives and to develop trusting and fruitful relationships with his clients. Therefore, it seems a fitting tribute to Ken to support other financial planning professionals, students, and educators in accessing the same tools and training. Contributions to the Ken Gillaspie Legacy Fund will be used to fund scholarships for the Money Quotient "Fundamentals of Financial Life Planning" Training course and related travel expenses.

Eligibility

The following individuals are invited to submit an application for a Money Quotient Scholarship: CFP® certificants and designees, students enrolled in a qualified CFP program, CFP Program Directors and Instructors, and/or members of the Financial Planning Association. To be eligible for selection, applicants must not have previously attended the Money Quotient "Fundamentals of Financial Life Planning" Training course.

Fundamentals of Financial Life Planning Training Course

The 2018 Ken Gillaspie Legacy Fund Scholarship recipient will be invited to participate in the 3-day "Fundamentals of Financial Life Planning" training session held October 10-12, 2018 in Portland, Oregon. The scholarship will cover the tuition in full and up to $1,000 in related transportation, lodging, and food expenses. *Please note the scholarship award does not include fees for licensing Money Quotient materials.*

Selection Process

Applications must be received by Money Quotient by FRIDAY July 20, 2018. Members of the Money Quotient Advisory Board will comprise the selection committee. They will review the applications and make the funding decisions based on application responses, plans for implementation, potential for impact, and so on. The selected recipient will be notified by Monday August 27, 2018.

[1]Money Quotient is a 501(c)(3) non-profit organization dedicated to life-centered financial planning education and research. All contributions to Money Quotient for the Ken Gillaspie Legacy Fund are tax-deductible.

Ken Gillaspie Legacy Fund

2018 Scholarship Application

Funding for Money Quotient "Fundamentals of Financial Life Planning"
Training Course Fees and Related Travel Expenses

INSTRUCTIONS: This a fillable PDF form and can be completed electronically. Place your cursor on the first field and type your response. Next, click on the next field or use your tab key. After completing your application, save the document to your computer and either **email** as an attachment to **KGLF@moneyquotient.org**, **fax** to **888.842.8435**, or **mail** to **1045 NE Oneonta Street, Portland, OR 97211.**

If you do not receive an acknowledgement within 10 working days that your application has been received, please contact Kelly at 360.697.4561 or kelly@moneyquotient.org.

To qualify for the scholarship you must *not* have attended "Fundamentals of Financial Life Planning" training in the past, and you must meet one or more of the requirements below. Please check all that apply:

☐ CFP certificant or designee ☐ Student in a qualified CFP program

☐ CFP program director or instructor ☐ Financial Planning Association Member

Name	Credentials and Years Awarded

Current Affiliation (company/school/organization)	Title/Role

Address

City	State	Zip

Phone	Fax	Email

Educational Background

Professional Background:

Current Work and/or Educational Pursuits:

Describe your professional goals:

Describe your philosophy of and approach to financial planning. If you are not a financial planner yourself, also explain your interest in and connection to the financial planning field.

Please explain why you are interested in attending Money Quotient's "Fundamentals of Financial Life Planning" training course:

How do you expect to use/apply the MQ training?

If awarded the scholarship, you will be invited to attend the "Fundamentals of Financial Life Planning" training session held **October 10-12, 2018** in Portland, Oregon.

Your application must be received by Money Quotient via fax, email, or postal service no later than **FRIDAY JULY 20, 2018.**

Fax: 888.842.8435
Email: **KGLF@moneyquotient.org**
Mailing address: 1045 NE Oneonta Street, Portland, OR 97211

If you have questions, please contact Money Quotient President, Carol Anderson, at: **carol@moneyquotient.org** or 360.697.4561