



## **The Foundation for Insurance and Financial Education**

600 State St., Suite A, Cedar Falls, IA 50613

Office: (855) 360-3395, Fax: (703) 621-3795

Email: [info@naifawisconsin.org](mailto:info@naifawisconsin.org)

Website: [www.naifawisconsin.org](http://www.naifawisconsin.org)

## ***Scholarship Application***

***Leadership in Life Institute***

***Field Management***

***LUTC***

The Foundation for Insurance and Financial Education is an affiliate organization of the National Association of Insurance and Financial Advisors of Wisconsin (NAIFA-Wisconsin). The stated purposes of the Foundation are three:

- To provide educational opportunities for students interested in pursuing careers in the insurance and financial services industry;
- To present educational information regarding insurance and financial services to the general public;
- To provide continuing education opportunities for individuals in the insurance and financial services industry.

One way in which this mission is accomplished is through scholarships. Below are the different scholarships that are awarded by the Foundation and the criteria for eligibility.

### ***Leadership in Life Institute – LILI Scholarship***

A scholarship will be awarded to one member of NAIFA Wisconsin towards tuition in the Leadership in Life Institute (LILI). Scholarships awarded will cover half of that year's LILI tuition. Applicants with three years or more of experience in the insurance business, and exhibited leadership abilities within their communities or local NAIFA association will be considered.

### ***The James H. Krueger, MSM, MSFS, ChFC, CLU, RHU, CLF, LUTCF, FIC Field Management Scholarship***

Scholarships will be awarded for any of the field management courses offered by GAMA International (General Agents and Managers Association). Scholarships will be awarded for half the cost of a course, not to exceed \$300.

### ***Life Underwriter Training Council – LUTC Scholarship***

Scholarships will be awarded for any of the core LUTCF curriculum courses offered by the College for Financial Planning. Scholarships will be awarded for up to \$300.

### **The criteria for eligibility are:**

- Member of NAIFA-Wisconsin in the “active” category as defined by its bylaws.
- Explanation of why the individual is seeking the scholarship, including a statement of financial need.
- Agreement to complete all requirements of the program or course for which they are seeking the scholarship.

# FIFE SCHOLARSHIP APPLICATION

*Please indicate the scholarship that you are applying for:*

*Leadership in Life Institute*

*Field Management*

*LUTC*

## CANDIDATE INFORMATION

NAME: \_\_\_\_\_

COMPANY: \_\_\_\_\_  
*(If you are an independent producer, please list your primary company/companies)*

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

LOCAL NAIFA ASSOCIATION: \_\_\_\_\_

YEARS OF NAIFA MEMBERSHIP: \_\_\_\_\_ YEAR OF LICENSURE: \_\_\_\_\_

1. Please explain why you are applying for this scholarship.

2. Membership in NAIFA is a requirement of eligibility for a scholarship. How do you envision your future role with NAIFA, and how will you pursue your leadership within NAIFA if you are chosen for a scholarship?

# FIFE SCHOLARSHIP APPLICATION

3. Please describe your financial need.

4. If you are chosen for this scholarship, how will you apply your increased professionalism to benefit your profession and the next generation of advisors?

5. **FOR LILI APPLICANTS ONLY**

Please provide information regarding your past leadership experiences (local NAIFA association, community organizations, political, academic, etc.)

# FIFE SCHOLARSHIP APPLICATION

**6. FOR FIELD MANAGEMENT AND LUTC APPLICANTS ONLY**

Please identify what course or program you will be studying and applying the scholarship towards.

**7. FOR FIELD MANAGEMENT AND LUTC APPLICANTS ONLY**

Please provide information regarding your professional development experiences to date (courses completed, goals for near term and long term).

**8. How did you hear about the FIFE scholarship program?**

APPLICANT SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

**APPLICATION DEADLINE IS MARCH 16**

Please complete the scholarship application and send it to:

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