Ken Gillaspie Legacy Fund

Composing Meaningful Conversations about Money and Life

2021 Scholarship Information

Funding to attend Money Quotient's virtual
"Fundamentals of True Wealth™ Planning" training course

Background

Ken Gillaspie was a founding partner of Security First Advisors and an active member of the Money Quotient 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 True Wealth™ Planning" Training course.

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 members of the Financial Planning Association (FPA) and/or National Association of Personal Financial Advisors (NAPFA). To be eligible for selection, applicants must not have previously attended the Money Quotient "Fundamentals of Financial Life Planning" or "Fundamentals of True Wealth™ Planning" Training course.

Fundamentals of True Wealth™ Planning Training Course

The 2021 Ken Gillaspie Legacy Fund Scholarship recipient will be invited to participate in the "Fundamentals of True Wealth™ Planning" virtual training course conducted on five consecutive business days, from **Wednesday, September 29 - Tuesday, October 5, 2021**. (There will be no classes on Saturday 10/2 or Sunday 10/3.) Each day, the schedule will run from **9:00 a.m. to 1:30 p.m. PT / 12:00 p.m. to 4:30 p.m. ET**. Attendance at all sessions for the five-day program will be required. The scholarship will cover the tuition in full.

Please note that the scholarship award does not include fees for licensing Money Quotient materials.

Selection Process

Applications must be received by MQ Research & Education by Wednesday, June 30, 2021.

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 9, 2021.**

Ken Gillaspie Legacy Fund
2021 Scholarship Application

Funding to attend Money Quotient's virtual
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INSTRUCTIONS: This a fillable PDF form and can be completed electronically. Place your cursor on the first field and type your response. Then 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@mqre.org**
- **print and 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 Jim at 360.697.4561 or jim@moneyquotient.com.

To qualify for the scholarship, you must not have attended the "Fundamentals of Financial Life Planning" or "Fundamentals of True Wealth™ 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
- ☐ CFP® program director or instructor
- ☐ FPA Member
- ☐ Student in a qualified CFP® Program
- ☐ NAPFA 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 True Wealth™ Planning" training course:

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

If awarded the scholarship, you will be invited to attend the five day "Fundamentals of True Wealth™ Planning" virtual training course to be conducted from **September 29 - October 1** and **October 4 - October 5, 2021**. For more information about the training course, please **click here**.

DEADLINE: Your application must be received by Money Quotient via email or postal service no later than **June 30, 2021**.

- **email** as an attachment to **KGLF@mqre.org**
- **print and mail** to 1045 NE Oneonta Street, Portland, OR 97211

If you have questions, please contact MQ Research & Education President, Carol Anderson at: **carol@mqre.org** or 360.697.4561.