

# Ken Gillaspie Legacy Fund

## Composing Meaningful Conversations about Money and Life

### 2022 Scholarship Information

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

#### Background

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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 opportunity. Contributions to the Ken Gillaspie Legacy Fund will be used to fund scholarships for the Money Quotient "Fundamentals of True Wealth™ Planning" course.

#### Eligibility

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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" courses.

#### Fundamentals of True Wealth™ Planning Course

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The 2022 Ken Gillaspie Legacy Fund Scholarship recipient will be invited to participate in an MQ "Fundamentals of True Wealth™ Planning" course of their choice (click course for details):

- **Live Course (Portland, OR): September 12-14 (8:30 am - 5:00 pm PT each day)**
- **Virtual Course: September 28-30 & October 3-4 (9:00 am-1:30 pm PT each day)**

Attendance at all sessions of the program will be required. The scholarship will cover the tuition in full and, if attending the live course, up to \$1,000 in related transportation, lodging, and food expenses. **Please note that the scholarship award does not include fees for licensing Money Quotient materials.**

#### Selection Process

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**Applications must be received by MQ Research & Education by Friday, May 27, 2022.**

Members of the MQ Advisory Board and the MQRE Governing 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 recipient(s) selected will be notified by Tuesday, July 19, 2022.**

# Ken Gillaspie Legacy Fund 2022 Scholarship Application

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

**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@mqr.org](mailto:KGLF@mqr.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](mailto: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" courses in the past, and you must meet one or more of the requirements below. **Please check all that apply:**

- |  |  |
|--|--|
| <input type="checkbox"/> CFP® certificant or designee        | <input type="checkbox"/> Student in a qualified CFP® Program |
| <input type="checkbox"/> CFP® program director or instructor | <input type="checkbox"/> NAPFA Member                        |
| <input type="checkbox"/> FPA Member                          |  |

Name	Credentials and Years Awarded
<input type="text"/>	<input type="text"/>

Current Affiliation (company/school/organization)	Title/Role
<input type="text"/>	<input type="text"/>

Address

City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>

Phone	Fax	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>

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" course:

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

If awarded the scholarship, you will be invited to attend an MQ "Fundamentals of True Wealth™ Planning" course of your choice (click the courses below for more info):

- **Live Course** (Portland, OR): **September 12-14** (8:30 am - 5:00 pm PT each day)
- **Virtual Course: September 28-30 & October 3-4** (9:00 am-1:30 pm PT each day)

**DEADLINE:** Your application must be received by Money Quotient via email or postal service no later than **Friday, May 27, 2022.**

- **email** as an attachment to [KGLF@mqre.org](mailto: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](mailto:carol@mqre.org) or 360.697.4561.