



Social Investment Forum
Foundation

Social Investment Forum Foundation Indigenous Peoples' Program Native American Student CFP Scholarship

Background

The Social Investment Forum Foundation (www.socialinvest.org) is a national nonprofit organization that conducts research and educational outreach to advance socially and environmentally responsible investing (SRI). The SIF Foundation works closely with the Social Investment Forum Ltd. (SIF), the national membership association dedicated to advancing the concept, practice and growth of socially and environmentally responsible investing. SIF has approximately 500 members, including financial planners and advisers, mutual fund companies, foundations, banks and credit unions, tribes and other native peoples organizations, community development financial institutions, and shareholder advocates.

SIF first created an Indigenous Peoples' program in 2003, and in 2007 SIF convened a national conference on Native American Leaders for SRI.

SIF's Indigenous Peoples' program seeks to address the cultural disconnect between Native and non-Native peoples, specifically in the area of SRI. We work to coordinate research, outreach, education and advocacy on financial and economic matters that affect Indigenous Peoples' cultures and communities. We strive to better address the topics of investment, development and business practices as they concern Indigenous Peoples.

A key facet of our Indigenous Peoples' program is to encourage socially responsible investing within indigenous communities. Because SRI incorporates environmental and social considerations, as well as governance factors, in the pursuit of a financial return, it resonates with the values of many indigenous communities. Indigenous cultures have been considered among the earliest social investors, since they have historically integrated a wide range of social and environmental concerns into their economic decision-making. SIF seeks to work with indigenous communities with the goal of increasing familiarity with SRI strategies and identifying ways for indigenous peoples and SRI professionals to work together.

Certified Financial Planner® Scholarship

Building on our past work, in 2008 the Social Investment Forum Foundation created a scholarship fund to enable a Native American student to enroll in the Mentor Program, a College of Financial Planning course of instruction. The course prepares students to pass the CERTIFIED FINANCIAL PLANNER® Certification Examination. This accreditation has become one of the standard requirements for entry into a very competitive field, and the College of Financial Planning provides one of the best processes to train for the CFP exam and for the practice of financial planning. Additionally, as part of our mission we expect the awardee to be committed to socially responsible investing.

The scholarship is being given in the amount of \$3,885—the cost of the College for Financial Planning’s comprehensive Online Mentor program. This is an online instructor-led class that offers students the opportunity to experience the structure and insight of classroom instruction with the convenience of being able to attend from work or home. It is a rigorous five-part course; each section lasts six weeks and includes five hours of online instruction per week. More information on this program is available at:

http://www.cffp.edu/portal/alias_Rainbow/lang_enUS/tabID_3336/DesktopDefault.aspx

This course fee will cover all materials for the Mentor program and a headset for online instruction, but does **not** include costs for any review sessions or the CFP® Certification Exam, which is handled by the CERTIFIED FINANCIAL PLANNER Board of Standards, a separate organization. It is the responsibility of the awardee to complete the additional, highly-recommended review (costs vary) and to take the Exam, which costs \$595.

Eligibility

Applicants will be reviewed based on the following criteria:

- Completion of application
- Accredited undergraduate degree (required by the College for Financial Planning)
- Tribal membership, including a history of maintaining engagement with the tribe
- Commitment to socially responsible financial planning and a career in SRI

Application Process

In order to apply, you will need to submit the following information:

- Application Form
- 400-500 Word Essay
- College Transcript
- 2 Letters of Recommendation (either academic or professional)
- Resume
- Proof of Tribal Membership

Applications must be postmarked by **March 31, 2009**. Applicants will be reviewed by an independent panel of judges involved in SRI, which will include representation from Native American communities and financial planners. Once a winner is chosen, the Social Investment Forum Foundation will register the winner for the College for Financial Planning Online Mentor Program.

The Social Investment Forum Foundation may include a photo, biography and interview with the winner on its web site and in any future publications. Additionally, the winner agrees to allow monitoring of his or her progress by the Social Investment Forum Foundation throughout the Mentor Program course and ending after completion of the CFP® Certification Exam.