



## Allworth Financial Scholarship Program Information & Guidelines

The Allworth Financial Scholarship (*previously the Houston Asset Management Charitable Foundation Scholarship*) was created with the intent to award scholarships to deserving students within the Greater Houston Metro districts pursuing a degree in a business field such as economics, finance, investments, accounting, or business administration with a desire to pursue a career in financial planning. This scholarship totals \$10,000 payable in \$2,500 increments over the next four years and includes a conditional internship opportunity between the student's junior and senior years.

### Criteria for Application

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To be eligible to apply for the Allworth Financial Scholarship, you must meet the following criteria:

- The applicant must be a college-bound, graduating senior and attend a high school within the Greater Houston Metro Districts.
- Planning to enroll as a full-time student in a bachelor's degree program at an accredited higher education institution in the fall semester. The institution must be able to receive the scholarship funding directly from the scholarship source on your behalf.
- **Majoring** in a business field such as economics, finance, investments, accounting, or management with a desire to pursue a career in financial planning.

### How to Apply

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The application window opens January 2<sup>nd</sup>. **We must receive your full application packet by April 30<sup>th</sup>, 2022.** Your packet must contain the following items:

1. Scholarship application with stated career objectives.
2. High school transcript containing requested 12<sup>th</sup> grade year information.
3. Copy of college entrance exam scores (ACT or SAT) if available.  
(*Note: Due to the pandemic, many colleges are waiving ACT/SAT requirement for graduating seniors*).
4. Resume (no longer than 2 pages).
5. Essay on the topic: **Based on your own, or those of an influential person in your life, describe what tools, beliefs, or qualities you will need for financial success.** (Your essay should not be more than two double-spaced pages in length).

**Return Completed Packet to the following:**

Allworth Financial  
Attn: Scholarship Committee  
1800 West Loop South, Suite 1980  
Houston, Texas 77027

### Application Review Process

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In May, the Scholarship Committee will begin reviewing applications. Four finalists will be selected to interview with our Scholarship Committee. If a finalist is unable to attend the interview, that finalist will forfeit his/her application and the committee will select another student to interview. After the interviews have been completed, the Scholarship Committee will make its decision and notify the recipient the following day. It is the intention of the Scholarship Committee to award the scholarship to a deserving high school senior by May 30<sup>th</sup> prior to graduation.

### Scholarship Guidelines

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The amount of the scholarship granted will total \$10,000, which will be dispersed in \$2,500 increments over 4 consecutive years. The winning student is required to maintain at least a 2.75 GPA to receive each subsequent year's payment. By August 1<sup>st</sup> of each year, the recipient will need to provide the committee an official college transcript from the previous school year. Checks will be made payable to the college or university for the benefit of the awarded college student. Each payment will be made at the beginning of the school year. An opportunity for an internship between the student's junior and senior year is also conditionally offered.

Allworth Financial employees, clients, and immediate family members of employees or clients are ineligible to participate. All applications received are treated in a confidential manner.

If you have any questions, please contact Kristian Taylor at (713) 629-1534 or [Kristian.Taylor@allworthfinancial.com](mailto:Kristian.Taylor@allworthfinancial.com).



Allworth Financial Scholarship Program  
Scholarship Application

**Personal Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**School Related Information**

High School: \_\_\_\_\_

Projected Graduation Date: \_\_\_\_\_

College/University (you are planning to attend): \_\_\_\_\_

Intended Major/Course of Study: \_\_\_\_\_

**Career Objectives**

Please return this completed application along with your Transcript, Resume and Essay to:

Allworth Financial  
Attn: Scholarship Committee  
1800 West Loop South, Suite 1980  
Houston, TX 77027