



AFCPE  
79 S. State Street, Suite D3  
Westerville, OH 43081  
Phone: 614-368-1055

## 2019 AFCPE® Annual Research and Training Symposium

Tuesday, November 19 through Thursday, November 21

### Financial Counseling Knowledge Bowl Guidelines

**Objective:** The objective of the AFCPE® Financial Counseling Knowledge Bowl is to provide an engaging and interactive format to promote the field of financial counseling to advance and expand the profession. This annual event engages university students in general personal finance and financial counseling issues and expands awareness of the professional community and organizations that support the profession.

**Overview:** The 2019 AFCPE® Financial Counseling Knowledge Bowl will be held during the 2019 AFCPE Annual Research and Training Symposium November 19 - 21 in Portland, OR. A maximum of 5 teams will compete against each other in a quiz-style competition during the symposium. Questions presented will be similar to those on the AFC® exam. The team with the most points at the end of the competition will win first place, next most points will be second, etc.

#### Benefits for AFCPE Knowledge Bowl Participants:

- Complimentary registration for the 2019 AFCPE Annual Symposium, November 19 - 21 in Portland, OR.
- One complimentary night stay at the Portland Marriott Downtown Waterfront hotel.
- A special Scholarship luncheon on November 19, 2019
- Opportunity to be paired with a conference mentor
- Excellent preparation for the AFC® exam
- Complimentary AFCPE Student Membership for 2020

#### Eligibility Requirements:

- Teams will consist of up to three\* currently enrolled undergraduate students.
- Each team must have a faculty or staff advisor from their institution.
- While multiple applications from a school may be accepted, only one team per school will be invited to participate.
- Students may only participate in one Knowledge Bowl competition; prior participants are not eligible.

#### Application Process:

- The application must be submitted online at [AFCPE® Financial Counseling Knowledge Bowl Application](#)
- Application information includes:
  - Name and contact information for each team member.



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- Name and contact information for the faculty/staff advisor.
- Response to the Selection dossier (see below).
- All teams must agree\*\* that if chosen, they will make travel arrangements that will allow them to:
  - Attend the full 2019 AFCPE Annual Symposium
  - Attend competition preparation session at the symposium – team advisor **MUST** be present as well.
  - Attend all sessions required by AFCPE (including the student luncheon on November 19, 2019)
  - Provide AFCPE with conference session attendance plans by November 1, 2019
  - Provide AFCPE with a post-conference summary (details to be provided at the conference)
- The completed application must be **received no later than April 15, 2019**.
- The applicant is responsible for reviewing and following all guidelines for submission. Students may only participate in one Knowledge Bowl competition; prior participants are not eligible.

\*Teams may include a 4th team member as an alternate in case a primary team member can't attend. All 4 may work together on the Selection Dossier but only the 3 team members that compete will receive funding.

\*\*An institution will lose eligibility for one year if their competing team does not successfully complete all the items agreed to in the application process.

### Selection Dossier:

The selection dossier will be required as part of the application process and will be the determining factor in identifying the teams that will participate in the AFCPE® Financial Counseling Knowledge Bowl. The selection dossier must include responses to the following:

- A brief introduction of each team member (a little background, current studies, and future plans)
- Why does your team want to compete in the financial counseling knowledge bowl?
- Why should the selection committee pick your team to compete?

Your team may use any form of media (or combination) to produce the dossier (for example it may include written response and/or pictures, audio, video, animation, etc. NOTE: all submissions **MUST** be in a format that all selection committee members can readily view without needing specialized software. Please house large, media-rich files on a server and provide a web-link in the application).

### Decision Process:



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- All applications will be reviewed by the Knowledge Bowl Review Committee, appointed by the AFCPE® Board of Directors.
- Dossiers will be evaluated and scored using the following criteria:
  - Clarity
  - Creativity
  - Perceived Opportunity
  - Importance of AFC®
  - Connection to AFCPE
  - Relevance
- A maximum of 5 teams will be invited to participate in the Financial Counseling Knowledge Bowl competition at the 2019 AFCPE Annual Research and Training Symposium in Portland, OR November 19-21, 2019.
- Participating teams will be announced by **May 15, 2019**.

#### Timeline:

- March 1, 2019 – Registration opens: Teams may submit their application
- April 15, 2019 - Registration deadline: No applications will be accepted after this date
- May 15, 2019 – Participating teams announced
- November 19-21, 2019 – Students participate in Symposium networking and learning opportunities
- November 19, 2019 – Scholarship luncheon and mentor connection
- November 20, 2019 – AFCPE® Symposium Knowledge Bowl Competition