Guidance for Submitting an Application for the Edwards Bursary

Thank you for your interest in applying for the Edwards Bursary offered by the Institute of Asset Management. This bursary aims to support individuals like you in advancing their asset management knowledge and skills. To help you with the application process, we have outlined the key information required, the criteria to be considered for the bursary, and the various suitable learning experiences that can be considered.

Eligibility Criteria
To be eligible for the Edwards Bursary, applicants must:

- Be a current individual member of the Institute of Asset Management at Student or Associate level.
- Demonstrate a genuine interest in asset management and a commitment to advancing their knowledge and skills in the field.
- Submit a comprehensive application explaining how the bursary will be utilized and the learning outcomes expected.

Application Contents
Your application for the Edwards Bursary should include:

a) Personal Information: Provide your full name, contact details, membership number, and any relevant affiliations or qualifications.

b) Learning Objectives: Clearly outline your learning objectives and the specific areas of asset management you wish to focus on. Explain how this learning experience will contribute to your personal and professional growth.

c) Suitable Learning Experiences: Describe the type of learning experience you plan to undertake. This can include, but is not limited to:
   - Courses and workshops: Certificate courses, diploma programs, or short workshops focused on asset management topics.
   - Taught programs: Structured educational programs or certifications offered by recognized institutions or organizations.
   - Conferences and seminars: Attending industry events and conferences to learn from experts and network with peers. Applicants must detail what learning experiences they will gain from attending and how they will participate (e.g. presenting, applying for an award etc).
   - Research projects: Undertaking research in specific asset management areas, contributing to knowledge and best practices.

   NB. Bursary funds will not be transferred to recipients until May 2027, so please ensure you have considered this when preparing your application. Learning experiences should occur AFTER this date and must be completed within one year of the transfer of funds.

d) Proposed Budget: Prepare a detailed budget plan for the bursary amount of up to £2000 GBP/ $2600 USD/ €2350 EUR/ $3700 CAD. Clearly specify how the funds will be used for the chosen learning experience, including registration fees, course materials, travel, accommodation, or any other relevant expenses.

e) Expected Outcomes: State the expected outcomes from the learning experience. Explain how the new knowledge and skills acquired will benefit your career in asset management and contribute to the advancement of the industry.

f) Supporting Documents: Attach any supporting documents required for the application, such as course brochures, acceptance letters, detailed quotes for expenses, or confirmation of work shadowing opportunities.

g) Alternative funding routes: Applicants should provide a clear explanation of why the Edwards Bursary is their only viable source of funding for the proposed learning experience. This should include details of any alternative funding options that have been explored, including whether financial support may be available through their employer or any other relevant organization.

Evaluating Criteria
Applications will be evaluated based on the following criteria:

- Relevance: The extent to which the proposed learning experience aligns with asset management and the applicant's career goals.

- Impact: The potential impact of the learning experience on the applicant's professional growth and contributions to the asset management field.

- Feasibility: The feasibility and appropriateness of the budget plan, ensuring that the requested amount is used efficiently to achieve the stated learning objectives.

- Clarity: The clarity and coherence of the applicant's submission, demonstrating a well-thought-out and organized plan.

Submission
Please submit your completed application as a Word document, along with any supporting documents, to bursary@theiam.org. Ensure that your application is submitted on or before 23:59 GMT on Friday 26 February 2027.

Bursary Usage and Reporting
Recipients of the Edwards Bursary are expected to utilize the funds for the specified learning experience within a year of the funds being issued. After completing the learning program, successful applicants will be required to submit a report summarizing their experience, outlining the knowledge gained and how it has impacted their professional development. This will be used to assess the achieved outcomes compared to the expected outcomes of the Edwards Bursary award and to support promotion of the Edwards Bursary to potential applicants. Extracts from the report and summarized information may be used in our *Assets* magazine, on our website, in communications etc. Successful applicants will also be asked to present about their experiences in an IAM webinar.

Important Dates
Make sure to adhere to the application submission deadline and any other important dates communicated by the Institute of Asset Management regarding the bursary.

07 September 2026: *Applications open for the Edwards Bursary*

26 February 2027: *Applications submission deadline*
All applicants must ensure they have submitted their applications by 23.59 GMT on Friday 26 February 2027. Submissions will not be accepted after the deadline under any circumstances.

31 March 2027: *Review applications and select recipients*
The review panel will evaluate all applications and decide who will receive a bursary contribution. **NB. There may be more than one bursary recipient.**

Week Commencing 04 April 2027: *Inform applicants of the outcome*
All applicants will be informed of the outcome of their application by this date. **NB. Applicants will be asked to keep this information confidential until after the Asset Management Excellence Awards on 23 June 2027.**

April – May 2027: *Approved bursary funds issued to recipients*

23 June 2027: *Announce bursary recipients at the Asset Management Excellence Awards*

April – May 2028: *Bursary recipients must ensure their learning experience is completed no later than one year after the receipt of funds. Bursary recipients must provide a written report of their experiences and will be asked to present their journey via an IAM Webinar. Recipients may also be asked to contribute to the IAM* Assets *magazine.*

We hope this guidance document helps you in preparing a strong application for the Edwards Bursary. If you have any further queries, feel free to contact bursary@theiam.org.