

FAQs

1. What is the Fifth Generation Fellow Program?

It's a three-month, family-centered fellowship designed to strengthen financial knowledge, leadership capacity and long-term generational planning for youth and their families. Each cohort focuses on the five pillars of OLLIE: Ownership, Leadership, Longevity, Insight, and Education.

2. Is there a cost to participate?

No! The fellowship is fully funded and free for selected families.

3. How long is the program?

The fellowship runs for **three months**, with **two virtual sessions per month**. Families are expected to actively participate and complete all exercises and assignments.

4. Who is eligible to apply?

The fellowship is open to families with a child(ren) aged newborn through 12th grade. School-aged child(ren) should maintain a minimum 3.0 GPA, and families must be committed to participating in all program activities.

5. Can families with multiple children apply?

Yes! Families with one or more child(ren) within the age range are welcome to apply. Please note: **the UTMA account award will be split among them.**

6. What are the application requirements?

- Completed application form
 - Short essay on why your family should be selected
 - Demonstrated parental/guardian commitment to participate
 - Minimum 3.0 GPA for school-aged child(ren)
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7. How many families are selected each year?

Each year, we select five- ten exceptional families.

8. How are fellows selected?

Applications are reviewed based on child(ren)'s engagement in activities, family commitment, motivation, alignment with our mission and the potential impact the fellowship will have on the family's long-term generational planning.

9. Are there income requirements?

There are no income requirements. Families are selected based on commitment, alignment and impact potential.

10. What is the application deadline and timeline?

Application opens: May 1, 2026

Application deadline: June 30, 2026

Notification date: August 2026

Program start date: October 2026

11. What does participation look like?

Families participate in **two virtual sessions per month** (Wednesdays): **7-8:30 PM EST**

- **October:** 7 & 21
- **November:** 4 & 18
- **December:** 2 & 16

Each session blends interactive workshops, practical tools, and guided exercises. **Children and at least one parent/guardian must attend** to be counted as present.

*Cameras must remain on the entire session

*Homework will be given for each session

*Each family will talk/present on each session

12. What technology is required to participate?

Participants will need:

A reliable internet connection

A device with video capability (computer or tablet preferred)

A quiet space for engagement

Sessions are interactive and cameras must remain on.

13. What if we need to miss a class?

As long as **one parent/guardian attends the class**, the family is counted as present for that session. Families are allowed **one makeup class** during the program.

14. Are there any in-person requirements?

All sessions are virtual to accommodate families across locations. Optional in-person events or networking opportunities may be offered depending on cohort and geography.

15. What kind of support do families receive?

Fellows and their families receive:

- Access to program workbooks and materials
 - Facilitated virtual sessions
 - Guidance on financial planning, leadership and generational strategy
 - Ongoing mentorship and family engagement tools
 - **UTMA accounts:**
 - Children newborn through middle school receive **\$500** to start their UTMA accounts (younger children receive less because their money has more time to accrue).
 - High school child(ren) receive **\$1,000** UTMA accounts.
 - **Multiple children in the same family:** The \$1,000 is split equally.
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16. What happens if a family does not meet participation expectations?

Removal from the program is possible and the family will not be able to reapply for future cohorts

The UTMA account will only be funded if all attendance, project and participation requirements are met

17. What is a UTMA account?

A **UTMA (Uniform Transfers to Minors Act) account** is an investment account set up in your child's name. The money belongs to your child and grows over time, giving them a financial start for the future. Fifth Generation League funds the account for each child as part of the fellowship.

18. What happens after the program is done?

Families are encouraged to continue implementing what they've learned. Fifth Generation League maintains a long-term alumni network to track impact and provide ongoing support, resources and opportunities.

Program Expectations & Commitment

Participation in the Fifth Generation Fellow Program is a commitment to growth, engagement, and family leadership. Selected families are expected to:

- Attend all scheduled sessions (two per month) and arrive on time
- Keep cameras on and remain actively engaged for the full session
- Ensure at least one parent/guardian attends every session
- Participate in discussions and family presentations during each session
- Complete all homework, reflection exercises and assigned activities
- Engage in meaningful family conversations outside of session time
- Demonstrate respect, professionalism and confidentiality within the cohort
- Communicate proactively with program staff regarding conflicts or concerns
- Uphold the values of Ownership, Leadership, Longevity, Insight and Education (OLLIE)
- Complete the full three-month fellowship to receive program benefits, including UTMA funding