

## Your Key Data

Legal Name \_\_\_\_\_

(last)

(first)

(middle initial)

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Male

Female

I am a new student

I am a returning student

My student number is \_\_\_\_\_

DO YOU HAVE AN INSURANCE LICENSE?  yes  no If yes, what is your state of licensure and your license number?

STATE: \_\_\_\_\_ LICENSE NUMBER: \_\_\_\_\_

I request CE credit for my course(s)  Yes  No CE Fee \$ \_\_\_\_\_

**(If left unchecked, CE will not be processed)** Fees apply in the following states. Please include the amount in the Fee Summary below.  
CT \$6.00 per course; MA \$.75 per credit; MD \$.60 per credit; MI \$1.00 per credit; MS \$4.00 per course; NH \$2.00 per credit; OH \$1.00 per credit; PA  
\$4.50 per course; WV \$1.75 per credit. For more information, call 888-263-7265.

## Address (UPS cannot deliver to a PO box)

Company Affiliation \_\_\_\_\_

Agency/Firm \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

ZIP/Postal Code \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Please enroll me in the Financial Planning Express™ program that begins:

Month \_\_\_\_\_

Day \_\_\_\_\_

Year \_\_\_\_\_

Location \_\_\_\_\_

## Fee Summary

Admission Fee (for new students) \$110

\$ \_\_\_\_\_

Financial Planning Express Fees

\$ **4995.00**

CE Fee (if applicable)

\$ \_\_\_\_\_

**Total**

\$ \_\_\_\_\_

## Method of Payment

Charge  VISA  MC  AmEx  Discover

Account Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

This signature serves as authorization to charge my credit card:

\_\_\_\_\_

TOTAL amount charged: \$ \_\_\_\_\_

## Submitting Your Form

**FAX** with payment to 610-526-1300

**MAIL** with payment to The American College, PO Box 1513, Bryn Mawr PA 19010-2196

Please be sure to read, sign and date the Enrollment Contract on the reverse side of this form.

For more information call 888-263-7265.

## Admission Declaration

(must be signed by new students to process registration)

The American College reserves the right to void any examination if, in its sole opinion, there is reason to question its validity. I agree to be bound by The American College's policies, and understand it is my responsibility to make myself aware of revised policies. I understand that I must complete the educational requirements for a degree program within 5 years from the date of the initial course registration in that program. The information on this application is accurate to the best of my knowledge.

All new students sign here:

\_\_\_\_\_

Date: \_\_\_\_\_

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## Financial Planning Express™ Enrollment Contract

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I hereby agree to the following terms and conditions for enrollment in the Financial Planning Express™ Course for the CFP® Certification Examination:

1. Subject to classroom space availability, I may audit classes or retake the review once I am enrolled provided:
  - a. I attend the majority of classes within the registered class cycle.
  - b. I purchase any materials that may be required and all other costs are also at my expense.
  - c. I must give 21 days notice to JR Financial Group, Inc. by calling 720-529-1888 or by email to [Jeff@jrfinancialgroup.com](mailto:Jeff@jrfinancialgroup.com) prior to the class date I wish to attend.
  - d. This offer is only valid prior to receiving the CFP® designation.
2. Initial class materials will be mailed to my provided shipping address. Future class material will be handed out in class. If I request subsequent materials to be mailed, I will be responsible for shipping costs.
3. I understand once I commit to the program, I am committing to a seat for the entire class cycle. The goal is to always conduct each class with all seats full. If I fail to show during the class cycle, then that seat will remain vacant for the entire program and cannot be resold. Classes require substantial preparation time in order to complete the program successfully. Due to this issue, our strict refund policy is based on the start date of the registered class cycle. See our website at [www.TheAmericanCollege.edu](http://www.TheAmericanCollege.edu) for specific starting dates.

91 or more days prior to the start of class = 100% refund less a \$250 nonrefundable administration fee  
90 to 76 days prior to the start of class = 75% refund less a \$250 nonrefundable administration fee  
75 to 60 days prior to the start of class = 50% refund less a \$250 nonrefundable administration fee  
60 days or less prior to the start of class including attending any class = 0% refund

4. Should I not be able to attend a particular class, JR Financial Group, Inc. will work with me to the best of their ability to place me into another group or location for the missed class. However, there is no guarantee that I will be able to attend the next scheduled class. As a result, this may extend my class cycle beyond my initially expected CFP® Certification Examination date.
5. Class may be canceled by Financial Planning Express™ up to 30 days prior to the first scheduled class due to insufficient enrollment, at which time I will be entitled to a full refund of the course tuition. Classes may also close without warning due to full enrollment.
6. I understand that the CFP® Certification Examination Review Materials are designed to provide accurate and authoritative information in regard to the subject matter covered. I understand that Financial Planning Express™ is not engaged in rendering legal, accounting, financial planning, or other professional services. If legal advice or other professional assistance is required, the services of a competent professional should be sought.
7. I agree that all controversies that may arise between us shall be resolved by independent arbitration. I agree to limit damages to the actual tuition fee and material costs only.
8. I understand that it is my responsibility to register with the Certified Financial Planner Board of Standards, Inc. to take the CFP® Certification Examination. Financial Planning Express™ is not responsible or liable for a failure to register or for any refusal by the CFP Board to accept my application. I also understand that effective 1/1/07, CFP Board requires that candidates for certification must have a bachelor's degree, in any discipline, from a regionally-accredited U.S. college or university in order to obtain CFP® certification.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (please print) \_\_\_\_\_