

_____HS 300 _____HS 311 _____HS 321
_____HS 326 _____HS 328 _____HS 330

**TRANSFER OF CREDIT APPLICATION
FOR STUDENTS HOLDING CFP® CERTIFICATION**

The American College has a transfer of credit policy under which students who have been awarded the CFP® Certification may receive credit for up to six (6) of the following courses:

HS 300 Fin. Plng Process and Environment	HS 326 Planning for Retirement Needs
HS 311 Fundamentals of Insurance Planning	HS 328 Investments
HS 321 Income Taxation	HS 330 Fundamentals of Estate Planning

You must be an approved matriculated student with The American College before applying for a transfer of credit.

If you are eligible and wish to apply for transfer of credit, please do the following:

- Complete the application below.
- Provide the Registrar of The American College with a Letter of Verification of the award of the CFP® Certification and that you are in good standing with Certified Financial Planner Board of Standards. This may be obtained by writing to Certified Financial Planner Board of Standards, 1700 Broadway, Suite 2100, Denver CO 80290-2101.
- The transfer of credit fee is \$60.00 per course. Mail your check in the amount required to cover the transfer of credit application fee to the Office of the Registrar, The American College, P.O. Box 1513, Bryn Mawr, PA 19010-2196. The transfer of credit fee(s) are not refundable and may not be credited to another student. If you wish to pay using your credit card please complete the following information:

CHARGE: () VISA () MASTERCARD () AMERICAN EXPRESS () DISCOVER

Card # _____ Expires _____

Total Amount _____

Name _____ Social Security No. _____

Company _____ Current Position _____

Address _____ Duties: _____

Telephone Number (____) _____ American College Student No. _____

Date of this Application _____

When did you complete the CFP® Certification Examination?

For Students who Completed all CFP® Certification course work Within Seven (7) Years Prior to the Date of this Application: Under your program of study, please indicate the courses for which you are requesting transfer of credit:

CLU

_____ HS 300
_____ HS 311
_____ HS 321

_____ HS 326
_____ HS 328
_____ HS 330

ChFC

_____ HS 300
_____ HS 311
_____ HS 321

_____ HS 326
_____ HS 328
_____ HS 330

For Students who Completed all or Some of the CFP® Certification course work More than Seven (7) Years Prior to the Date of this Application: Under your program of study, please indicate the courses for which you are requesting transfer of credit:

CLU

_____ HS 300
_____ HS 311
_____ HS 321

_____ HS 326
_____ HS 328
_____ HS 330

ChFC

_____ HS 300
_____ HS 311
_____ HS 321

_____ HS 326
_____ HS 328
_____ HS 330

Your application will be evaluated by a Faculty Transfer of Credit Committee on the basis of factors that include the following:

- how long ago courses for the designation were passed
- the extent of recent business activity in the fields related to the subject matter of the courses for which credit is sought
- continuing education activity in fields related to the subject matter of the courses for which credit is sought

To aid the committee please answer the following questions **for each of the areas listed below.**

1. What business activities do you perform?
2. What percentage of your work time is devoted to business activities in these areas?
3. What licenses do you hold, and how long have you held them?
4. What educational activities have you undertaken within the last seven years?

Income Taxation (If you are requesting transfer of credit for HS 321)

- 1.
- 2.
- 3.
- 4.

Pension Planning (If you are requesting transfer of credit for HS 326)

- 1.
- 2.
- 3.
- 4.

Investments (If you are requesting transfer of credit for HS 328)

- 1.

2.

3.

4.

Estate Planning (If you are requesting transfer of credit for HS 330)

1.

2.

3.

4.

Please provide any additional information you feel might be of help to the Transfer of Credit Committee.

NOTE: Your application cannot be processed until all information is provided and fees are paid.

Mail To: Office of the Registrar
Attn: Xiaohua Su
The American College
P.O. Box 1513
270 S. Bryn Mawr Avenue
Bryn Mawr, PA 19010-2196