

_____ HS 330

_____ HS 331

**TRANSFER OF CREDIT APPLICATION
FOR STUDENTS COMPLETING TAX ADVISOR PROGRAM**

The American College has a transfer of credit policy under which students who have completed the Accredited Tax Advisor program may receive credit for one or more of the following courses:

- HS 330 Fundamentals of Estate Planning
- HS 331 Planning for Business Owners and Professionals

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 transcript showing the date on which each course was passed. Transcripts can be obtained from the Registrar, National Endowment For Financial Education, 4695 S. Monaco Street, Denver, CO 80237-3403. In addition to the transcript your application must be accompanied by verification that you have been authorized to use the Accredited Tax Preparer mark. This may be obtained by writing to: ACAT, 1010 North Fairfax Street, Alexandria, VA 22314.
- 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 _____

Date of this Application _____

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

When did you complete your Accredited Tax Advisor examinations? _____

For students who completed all Accredited Tax Advisor Program 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 330

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ChFC

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For students who completed all or some of the Accredited Tax advisor Program course work more than seven (7) years prior to this application. Under your program of study, please indicate the courses for which you are requesting transfer of credit:

CLU

_____ HS 330

_____ HS 331

ChFC

_____ HS 330

_____ HS 331

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.

For each of the areas below answer each of the following:

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?

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

1.

2.

3.

4.

Business Insurance and Planning (If you are requesting transfer of credit for HS 331)

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 received and fees are paid.

MAIL TO: Office of the Registrar
Attn: Lorraine Altrichter
The American College
P.O. Box 1513
270 S. Bryn Mawr Avenue
Bryn Mawr, PA 19010-2196