



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®

APPLICATION FOR TRANSFER OF CREDIT FOR STUDENTS HOLDING CFA DESIGNATION

The American College has a transfer of credit policy, under which students who have been awarded the CFA designation may receive credit for **Investments** (HS 328), leading to the CLU® and ChFC® designations.

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:

1. Complete the application below.
2. Provide the Registrar with a **letter** from the Institute of Chartered Financial Analysts showing the date of your CFA designation and the dates on which you passed your CFA examinations. This may be obtained by writing to:

The Institute of Chartered Financial Analysts
P.O. Box 3668
Charlottesville, VA 22903

3. Mail your information to:

The Office of the Registrar
ATTN: Xiaohua Su
The American College of Financial Services
630 Allendale Road, Suite 400
King of Prussia, PA 19406

Transfer of Credits Requested: _____ HS 328

Date of this Application _____ American College Student ID# _____

Name: _____

Company: _____ Current Position: _____

Duties: _____

Address: _____

Telephone: (_____) _____ - _____

When did you complete your CFA examination? _____

If you completed all of your CFA examinations within the last seven (7) years, you are automatically eligible for transfer of credit and no further completion of this form is necessary.

If you completed any of your CFA examinations more than seven (7) years ago, please provide the information below. Your application will be evaluated by a Faculty Transfer of Credit Committee on the basis of the information you provide.

1. What business activities do you perform that relate to investments?

2. What percentage of your work time is devoted to business activities involving Investments? _____ %

3. What continuing education or other educational activities have you undertaken within the last seven years that pertain to investments?

4. Please provide any other information that you feel might aid the committee in the evaluation of your application.

NOTE: Your application cannot be processed until all information is provided.