



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®

APPLICATION FOR TRANSFER OF CREDIT FOR STUDENTS HOLDING CFP® DESIGNATION

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 seven (7) of the following courses:

Fin. Planning Process and Environment (HS 300)

Planning for Retirement Needs (HS 326)

Fundamentals of Insurance Planning (HS 311)

Investments (HS 328)

Income Taxation (HS 321)

Fundamentals of Estate Planning (HS 330)

Personal Financial Planning: Case Analysis (HS 333) – This course will only be eligible for transfer if the case course was taken as part of the preparation and qualification to sit for the CFP exam. A case course taken after the CFP exam was taken does not transfer.

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. Please note that as a CFP® Certificate holder, you must provide with this application a **verification letter** of the award of your CFP® certification and its current good standing. This may be obtained by contacting:

**CFP Board of Standards
1425 K Street, NW Suite 500
Washington, DC 20005**

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**

Date of this Application _____ American College Student ID# _____

Name: _____

Company: _____ Current Position: _____

Duties: _____

Address: _____

Telephone: (_____) _____ - _____

When did you complete the CFP® Certification Examination?

- _____ Less than seven years ago
- _____ More than seven years ago

CLU® Chartered Life Underwriter

For students who completed all or some CFP® Certification course work and wish to earn the **CLU® designation**, please indicate which required/elective courses you are transferring in:

Required:

HS 311 _____
HS 330 _____

Electives:

HS 300 _____ HS 326 _____
HS 321 _____ HS 328 _____

ChFC® Chartered Financial Consultant

For students who completed all or some CFP® Certification course work and wish to earn the **ChFC® designation**, please indicate which required/elective courses you are transferring in:

Required:

HS 300 _____ HS 328 _____ HS 311 _____ HS 333 _____
HS 321 _____ HS 326 _____ HS 330 _____

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

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

If you are requesting transfer of credit for **HS 321**, please answer the above questions as they relate to Income Taxation

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

If you are requesting transfer of credit for **HS 328**, please answer the above questions as they relate to Investments

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

If you are requesting transfer of credit for **HS 326**, please answer the above questions as they relate to Retirement Planning

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

If you are requesting transfer of credit for **HS 330**, please answer the above questions as they relate to Estate Planning

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

Did you take the HS 333 (Capstone) course as part of the CFP Board Exam?
Yes _____ No _____

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