



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®

APPLICATION FOR TRANSFER OF CREDIT FOR STUDENTS HOLDING CPA DESIGNATION

The American College has a transfer of credit policy under which students who have been awarded the CPA designation may receive credit for **HS 321 Income Taxation** 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 transcript showing the date your CPA designation was awarded and the date on which you passed the examinations.
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 321

Date of this Application _____ American College Student ID# _____

Name: _____

Company: _____ Current Position: _____

Duties: _____

Address: _____

Telephone: (_____) _____ - _____

When did you complete your CPA examinations? _____

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

1. Have you continued to meet the continuing education requirements of your state for CPAs?
Yes _____ No _____
2. What percentage of your work time is devoted to business activities involving personal income taxation? _____
3. What continuing education or other educational activities have you undertaken within the last seven years that pertains to income taxation?
4. What business activities do you perform that relate to investments?
5. Please provide any other information that you feel might aid the committee in the evaluation of your application.