

NAIFA 15% Discount Application

NAIFA Membership #

Enrollment Contact

First Name

Middle

Last Name

Company

Address

(UPS will not deliver to P.O. Box)

Address Cont.

City

State

Zip Code

Home Address

Business Address

Business Phone Number

Alternate Phone Number

Primary e-mail

Alternate e-mail

Last four Digits of SSN

(Required for CFP Course Completion and CE Reporting)

Check your highest level of education: High School Associate's Bachelor's Master's Post Master's

Would you like to use this course/program for State Insurance CE Credit? Yes No ****If no, skip to signature**

*Course(s) may not be approved for CE in all states

NPN:

State:

License #:

State:

License #:

If additional licenses are required, please contact your Enrollment Advisor

State:

License #:

State:

License #:

Agreement & Signature

I understand that the College for Financial Planning will use e-mail as the primary method of communication with me concerning notification of information about policy changes, my status in the program, etc. I agree and consent to the College for Financial Planning sharing my e-mail address with instructors and other students in my classes for educational purposes. I also understand that it is my responsibility to keep the College informed of any changes to my e-mail address, mailing address, and phone numbers.

Furthermore I have read, understand, and agree to all of the policies and procedures stated in the catalog and on the website for the College for Financial Planning, Inc. including but not limited to those relating admission requirements, fees, sales tax, refund policy, updating of study materials, privacy policy, examination and testing, length of enrollment, and completion requirements. I certify that all statements in this application are complete and true. I grant the College for Financial Planning permission to provide my employer with information regarding my status and examination results.

Signature

Date

All MyChoice Professional Designation Program enrollments include online virtual classes, e-books, interactive quizzes and online testing. Printed materials may be purchased separately.		MyChoice
Asset Management		
Accredited Asset Management Specialist SM or AAMS [®] (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
Accredited Domestic Partnership Advisor SM or ADPA SM (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
Accredited Portfolio Management Advisor SM or APMA SM (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
Accredited Wealth Management Advisor SM or AWMA [®] (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
Chartered Mutual Fund Counselor SM or CMFC [®] (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
RETIREMENT PLANNING*		
Chartered Retirement Planning Counselor SM or CRPC [®] (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
Chartered Retirement Plans Specialist SM or CRPS [®] (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
FINANCIAL PLANNING		
Foundations in Financial Planning SM Leading to the RP [®] Designation* (Regular Pricing \$1140)	<input type="checkbox"/>	\$969.00
CFP Certification Professional Education Program** (Regular Pricing \$4670)	<input type="checkbox"/>	\$3969.50
CFP EDUCATION PROGRAM COURSES*		
CFPE 501: The Financial Planning Process & Insurance (Regular Pricing \$920)	<input type="checkbox"/>	\$782.00
CFPE 502: Investment Planning (Regular Pricing \$920)	<input type="checkbox"/>	\$782.00
CFPE 503: Income Tax Planning (Regular Pricing \$920)	<input type="checkbox"/>	\$782.00
CFPE 504: Retirement Planning & Employee Benefits (Regular Pricing \$920)	<input type="checkbox"/>	\$782.00
CFPE 505: Estate Planning (Regular Pricing \$920)	<input type="checkbox"/>	\$782.00
CFPE 506: Financial Plan Development (Regular Pricing \$920)	<input type="checkbox"/>	\$782.00
PRINTED MATERIALS (Price per set) <input type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/>		
		\$127.50
Nonrefundable Handling Fee (only applicable with printed materials)		\$9.95
TOTAL (shipping and taxation may be applicable in your area)		

Note: The Professional Designation Programs or CFP Education Program do not include printed materials. Printed materials may be purchased for an additional fee. The above tuition and fees are effective January 2014. All fees include a nonrefundable program enrollment fee and shipping & handling fee. All professional designation program enrollments include one (1) examination at an approved testing center. *Includes \$160 nonrefundable enrollment fee. **Includes \$400 nonrefundable enrollment fee.

Payment Information

Method of payment Visa Master Card American Express Money Order Discover Check Check # _____

Credit Card Number _____ Expiration Date

Name on Card

Signature _____ Date _____