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Life Underwriters Training Course (LUTC) & The Financial Service Specialist (FSS)


STUDENT DEFERRAL FORM

(Please ensure all information is legible)

Semester Enrolled: _____ Year Enrolled: _____ CARAIFA Student ID: _____

Deferred to Semester: _____ *(Nb. Request for deferrals must be within 14 days of start of class)*

Given Name: _____ Surname: _____ Initial: *MIDDLE*

Date of Birth: *dd/mm/yyyy* Office phone: _____ Mobile Phone: _____  pin: _____

Email: _____ Company Name: _____

Branch Address: _____

Manager's Name: _____ Branch Secretary's Name: _____

Physician's Name: _____ Phone: _____

(Please indicate LUTC/FSS module)

- | | |
|---|--|
| <input type="checkbox"/> LUTC 201 <i>(Exploring Personal Markets)</i> | <input type="checkbox"/> FSS 262 <i>(Foundations of Financial Planning: An Overview)</i> |
| <input type="checkbox"/> LUTC 202 <i>(Meeting Client Need)</i> | <input type="checkbox"/> FSS 263 <i>(Foundations of Financial Planning: The Process)</i> |
| <input type="checkbox"/> LUTC 251 <i>(Business Continuity)</i> | <input type="checkbox"/> FSS 271 <i>(Foundations of Estate Planning)</i> |
| <input type="checkbox"/> LUTC 261 <i>(Retirement Planning)</i> | <input type="checkbox"/> FA 200 <i>(Techniques for Prospecting: Prospect or Perish)</i> |
| <input type="checkbox"/> LUTC 211 <i>(Disability Income)</i> | |
| <input type="checkbox"/> * LUTC 290 <i>(Ethics for Financial Professionals)</i> | |

(Please indicate class area)

North

South

East

(Nb: all classes are subject to class size and Moderator's location)

	<i>Member</i>	<i>Non-Member</i>
✓ LUTC <i>(Life Underwriters Training Course)</i>	\$750	\$900
✓ FSS <i>(The Financial Service Specialist)</i>	\$750	\$900
✓ FA <i>(Financial Advisor)</i>	\$750	\$900
✓ *LUTC 290 <i>(Ethics for Financial Professionals)</i>	\$750	\$900

(Please indicate payment method) **Company cheque**

Personal cheque

Linx

Cash

\$ _____

I understand that successful completion of a LUTC/FSS module depends on class participation, written assignments, field projects, 80% class attendance and at least 70% passing grade on the final examination. Furthermore I agree that any behavior that adversely affects classes is subject to disenrollment & possible barring from future enrollment in any of the LUTC/FSS modules.

I have read, understood and agreed to the terms and conditions stated above,

Signature

Date