

Chartered Life Underwriter (CLU) | Chartered Financial Consultant (ChFC) STUDENT ENROLLMENT FORM

Enrollment Year: _____ ☐ New Student ☐ Returning Student (ID): _____	Indicate Semester ☐ Semester 1 ☐ Semester 2 ☐ Semester 3	Enrollment Deadlines November March June	Exams March July November
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(Please ensure all information is legible)

First Name: _____ Surname: _____ Middle Initial: _____

Name change (Deed Poll or Marriage) please indicate: _____

Date of Birth: _____ Mobile Phone: _____ Email: _____

Company: _____ Company Address: _____ Work Phone: _____

Branch Manager: _____ Branch Secretary: _____

Physician's Name: _____ Physician's Contact: _____

(Please indicate which course you are interested in pursuing)

CLU COURSES

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| ☐ HS 311 (Fundamentals of Insurance Planning) | ☐ HS 331 (Planning for Business Owners & Professionals) |
| ☐ HS 323 (Individual Life Insurance) | ☐ HS 300 (Financial Planning: Process and Environment) |
| ☐ HS 324 (Life Insurance Law) | ☐ HS 326 (Planning for Retirement Needs) |
| ☐ HS 330 (Fundamentals of Estate Planning) | ☐ HS 328 (Investments) |

ChFC COURSES - *N.B. The first 5 courses of this designation are HS 300, 311, 326, 328 and 330 from the CLU Designation.*

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| ☐ HS 321 (Income Taxation) | ☐ HS 319 (Applications in Financial Planning II) |
| ☐ HS 314 (Applications in Financial Planning) | ☐ HS 333 (Personal Financial Planning: Case Analysis) |

Association Member	US \$1,000 per course
Select Payment Method (Shade/Tick Square)	Personal Cheque Company Cheque Linx Cash \$
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APPLICANT'S STATEMENT: I understand that (1) successful completion of the course based on class participation, assignments and field projects, 80% attendance (NO EXCEPTION), a passing grade on a final examination acceptable to CARAIFA and (2) my enrollment and final status may be reported to my company. I further understand that any student whose behavior adversely affects reasonable order in class is subject to disenrollment, and may be barred from future participation in FSCP courses. The information on this application is accurate to the best of my knowledge.

NO REFUNDS WILL BE ENTERTAINED AFTER DEADLINE DATE. SEE PAGE 24 IN THE TTAIFA STUDENT HANDBOOK.

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

Applicant Signature

Date Signed