

**College for Financial Planning**  
**TRANSFER OF COURSE CREDIT**

Transfer of a course(s) from other programs and other institutions into the College's CFP® Certification Professional Education Program may be allowed. The following information will assist you in deciding if it is appropriate for you to apply for transfer of course credit. The Petition form is attached and should be used in conjunction with the current College for Financial Planning catalog. Please retain copies of these documents for later use and reference.

**The Applicant is responsible for the following:**

- Completing and submitting the Petition for Transfer of Course Credit. The course(s) to be transferred should be clearly indicated on the petition.
- Completing an application for enrollment for the appropriate educational program. The application is found on the College's Web site at [www.cffp.edu](http://www.cffp.edu) under the Forms link, or you may contact the Enrollment department at 800.237.9990, option 3
- Providing an official transcript that supports the Petition for Transfer of Course Credit submitted. Delay in providing the transcript will cause a delay in the decision process.  
*Official transcripts are those that (1) are received by the College directly from the institution where the course was taken, (2) bear the raised seal or other authentication mark of the issuing institution, (3) bear a recent date of issue, (4) are signed by the Registrar or other school official, and (5) show no evidence of alteration or falsification. The transcript should not be marked "unofficial" or "issued to student."*
- Providing other supporting documents that are requested by the Transfer of Credit Committee. Supporting documents may include course descriptions, course syllabi, etc. Neither transcripts nor supporting documents will be returned to the applicant. **Applicants are encouraged to supply this documentation with the Petition form.**

**The College for Financial Planning is responsible for the following:**

- Evaluating the course(s) indicated on the Petition for Transfer of Course Credit. The Transfer of Credit Committee will not search the transcript for transferable courses that are not indicated on the petition.
- Evaluating courses based on the topic areas that are covered in the College's CFP® program courses.
- Asking for additional information, if necessary, to determine transferability of a course.

**Transfer of Course Credit Policies**

- Transfer of credit will not be awarded if the applicant has previously taken the College's examination over the course that is to be replaced by the transferred courses(s).
- Courses must have been completed at a regionally accredited institution within 10 years of submission of the petition
- However, courses including a substantial tax component must have been completed within five years, such as CFPE1103—Income Tax Planning, CFPE1104—Retirement Planning and Employee Benefits, and CFPE1105—Estate Planning.
- Course(s) transferred must have been completed with a grade of C or higher.
- A maximum of two courses may be transferred.
- The decision of the Transfer of Credit Committee is final.

### Program Cost

If transfer credit is approved the student is responsible for purchasing the remaining courses in the program to which he or she is applying. If transferring into the College's bundled five-course CFP® program, the program tuition will be prorated.

### Transfer Options

The table below indicates a sample of transfer options that have been approved by the College; however, all petitions must be individually approved by the Transfer of Credit Committee and conform to the additional criteria in the table.

Please be aware the Transfer of Credit Committee will not consider work or life experience. Any license or registration will also not be considered for transfer credit.

Source of the Transfer of Credit – Sample Course Numbers	Additional Criteria	Courses Replaced by Transferred Course(s)
HS318 or HS300 and HS311	Complete within last 10 years	Financial Planning & Insurance
HS328	Complete within last 10 years	Investment Planning
HS321	Complete within last 5 years	Income Tax Planning
HS326 and either 318 or 325	Complete 2 crs within 5 years	Retirement Planning
HS330	Complete within last 5 years	Estate Planning

## College for Financial Planning

### Petition for Transfer of Course Credit

Please attach this form to the complete program application form. The name and Social Security number listed on both forms should be the same. Do not use this form if you are applying for the Master of Science degree program.

The information on this petition will not be presented to the Transfer of Credit Committee until official transcripts that support the petition have been received. This form, and official transcripts, should be sent to **Office of the Registrar, College for Financial Planning, 8000 E. Maplewood Ave., Suite 200, Greenwood Village, CO 80111**. You may also fax your completed Petition for Transfer of Course Credit to 602.366.3391.

#### I. Personal Information

Name:		
Social Security Number:		Student ID Number:
Address:		
City, State, Zip Code:		Email Address:
Business Phone:	Home Phone:	Fax Number:

#### II. Transfer of Course Credit

Please arrange to have official transcripts mailed **directly** to the address above from the college(s) or university(s) listed. Transcripts issued to students, faxed or emailed transcripts will not be accepted for evaluation. A delay in receiving transcripts will result in a delay in receiving results of the evaluation.

List the College's CFP<sup>®</sup> program course to be replaced by the transferred course(s), the institution where the course(s) was taken and the specific courses(s) you want to have evaluated for transfer of course credit.

A. College for Financial Planning CFP <sup>®</sup> Certification Professional Education Program course to be replaced:				
Institution where the course was taken:				
Course Number/Code	Course Name	Credit Hours	Grade	Completion Date
College Use: Approved: _____			Date: _____	

B. College for Financial Planning CFP® Certification Professional Education Program course to be replaced:				
Institution where the course was taken:				
Course Number/Code	Course Name	Credit Hours	Grade	Completion Date
College Use: Approved: _____			Date: _____	

List supporting documents and other documents included.

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### III. Enrollment Options

Indicate if you wish to be enrolled in the CFP® Program even if your petition is not approved.

Yes \_\_\_\_\_ No \_\_\_\_\_ Undecided \_\_\_\_\_

### IV. Agreement and Signature

I understand that all information will be reviewed by the Transfer of Credit Committee or its designee and that the decision of the Committee will be final. Additional information may be requested, and it is my responsibility to provide such information as requested by the Committee. I attest to the truth and accuracy of the information contained in this petition for transfer. If a transfer of course credit is allowed, I will not hold the College for Financial Planning responsible for my failure on any subsequent examination.

Signature \_\_\_\_\_ Date \_\_\_\_\_