

Kaplan Financial Enrollment Agreement for Live Review & Review Material

Enroll in Live Review Courses taking place for the November 2007 and March 2008 CFP® Certification Examination® by completing this Student Enrollment Agreement. These prices are valid until March 16, 2008.

For more information including class locations, dates, and times visit www.kaplanfinancial.com.

How to Enroll

Mail/FAX completed enrollment forms to:

Kaplan Financial
 Fax: 1-312-455-6993
 30 South Wacker Drive, Ste. 2500
 Chicago, IL 60606
 Attn: Enrollment Advisor

Call for more information:

Kaplan Financial
 Tel: 1-888-694-3568
 30 South Wacker Drive, Ste. 2500
 Chicago, IL 60606

Student Profile

Please print legibly, fill in all sections completely, and sign on page three for your enrollment to be accepted.

NAME _____

HOME ADDRESS _____

CITY _____ STATE _____ ZIP _____

HOME PHONE _____ HOME FAX _____

EMAIL ADDRESS (required for confirmation) _____

DATE OF BIRTH _____ EXPECTED EXAM DATE _____

DESIGNATIONS: CPA CFA CLU ChFC Other _____

ARE YOU TAKING EXAM ON A CHALLENGE STATUS? YES NO

IF NOT, WHAT CFP BOARD-REGISTERED PROGRAM DID YOU TAKE? _____

LIST PREVIOUS CFP® CERTIFICATION EXAMS TAKEN _____

LIST PREVIOUS REVIEWS TAKEN _____

YEARS OF FINANCIAL PLANNING WORK EXPERIENCE _____

EDUCATION: SOME COLLEGE BACHELORS DEGREE GRADUATE J.D. PhD or EQUIVALENT

SHIPPING INFORMATION

SAME AS ABOVE ADDRESS PLEASE SHIP TO:

SHIPPING ADDRESS _____

CITY _____ STATE _____ ZIP _____

Employment Information

COMPANY NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

BUSINESS PHONE _____ BUSINESS FAX _____



Kaplan Financial includes: Schweser a Kaplan Professional company and these former companies: Dearborn Financial Services, BISYS Education Services, eMind, Insurance Achievement

Live Review Enrollment Options & Tuition

Please visit the Kaplan Financial web site at www.kaplanfinancial.com or call an Enrollment Advisor at 1-888-694-3568 for the current Live Review offerings.

- DISCOUNTED LOCATION IN ORLANDO, FLORIDA! Traditional Classroom Live Review 5-day (38 instruction hours) –only \$800 (\$125 OFF REGULAR PRICE OF \$925)**

Please indicate Review Dates _____

- Traditional Classroom Live Review 5-day (38 instruction hours) - \$925**

Please indicate Review Location (City, State) _____

Please indicate Review Dates _____

- Traditional Classroom Live Review 6-day (48 instruction hours) - \$990**

Please indicate Review Location (City, State) _____

Please indicate Review Dates _____

- Boston, MA Traditional Classroom Live Review 8-day (64 instruction hours) - \$1195**

Please indicate Review Dates _____

- Virtual Classroom Live Review (48 instruction hours) 17 three -hour sessions - \$990**

Please indicate Review Class Start Time **4:00-7:00pm (ET)** **7:30-10:30pm (ET)** _____

- Virtual Classroom Live Review (48 instruction hours) 10 five -hour sessions - \$990**

Please indicate Review Class Start Time **5:30PM-10:30pm (ET)** _____

NOTE: The required Kaplan Review materials for the CFP® Certification Examination, Volume I-VIII, are **not** included in the cost of tuition and **are required** for the course. Please see page 4 to order your course materials. All students must purchase the Silver package as the minimum pre study course material requirement. For your best value, we recommend the **Platinum Package** (a savings OF OVER 40% from retail).

All tuition prices include \$50 nonrefundable registration fee. Deadline is two weeks prior to first day of class. Late registrations will be charged \$50 late processing fee

Tuition for all Live Review Courses include:

- √ Classroom instruction with instructors who are CFP® certificants.
- √ Student Folder.
- √ In-class materials - *Kaplan Review Student Guide Binder*.
- √ Tip of the week.
- √ Online Diagnostic Exam.
- √ Access to Exam Support Team.
- √ Online Cognitive Connections.
- √ Kaplan Financial Guarantee.

Live Review Payment Options

CREDIT CARD OR BANK CARD:

1

Visa MasterCard American Express Discover

CARD NUMBER _____ EXP DATE _____

2

SIGNATURE _____

CHECK OR MONEY ORDER: When paying by check or money order, the full tuition rate is due with your completed application. Please make check payable to Kaplan Financial and mail to 30 S. Wacker, Suite 2500, Chicago, IL 60606-1719, Attn: Enrollment Advisor. Be sure to include a completed enrollment form with payment.

Live Review Terms and Conditions

Tuition and General Billing Terms

All tuition must be paid prior to beginning course work. Tuition is payable by check, money order, credit card or by bankcard.

Cancellation and Rollover Policy

- Students may receive a refund minus the \$50 registration fee, if the review registration is cancelled prior to in-class materials being shipped.
- Students may receive a refund minus \$350 (includes the \$50 registration fee), if the review registration is cancelled after the in-class materials have been shipped.
- Students are able to roll their paid registration over only once and it must be applied to the next exam cycle. The student must contact the Enrollment Advisor Team in writing requesting to roll the registration prior to the first day of the review class for which they have registered.
- Kaplan Financial may cancel classes due to insufficient enrollment up to two weeks prior to the first scheduled review class at which time student will be entitled to a full refund of course tuition. Classes may also close due to high enrollment.

Waiver and Release

Kaplan University and/or Kaplan Financial may disclose my student information to my employer, including but not limited to, name, address, date of course enrollment, date of completion and grade, for the purpose of tuition reimbursement and other internal procedures commonly requested by corporate customers.

Live Review Course Materials

The Live Review Course tuition includes in-class materials. However, students are required to purchase, at a minimum, the current edition of the Kaplan Review for the CFP® Certification Examination Volume I–VIII. This is a separate cost not included in the price of tuition. This material is used as pre-study—pre-class assignments will be provided.

Order Confirmation

Students should receive a confirmation of Review Registration. Please contact an Enrollment Advisor if you do not receive a confirmation within 7 business days of your registration.

Kaplan Financial Guarantee of Success

Kaplan Financial is so confident that our review students will pass the exam after taking our Live Review; we guarantee your success. If you do not pass the CFP® Certification Examination after attending a Kaplan Financial Live Review you are eligible to receive free tuition for a review within a one-year period of time (three exam cycles).

To be eligible you must:

1. Attend at least 80% of the review class time.
2. Submit your Official Score Report for the CFP® Certification Examination to fpexamresults@kaplan.com within three weeks of receiving it from the CFP board. All grades provided are absolutely confidential.
3. Complete a new registration form indicating when/where you would like to take your free review.

The free tuition includes in-class materials, but does not include the cost of the required textbooks, (Volumes I–VIII) for the Kaplan Review for the CFP® Certification Examination.

In the event a student needs to take additional retakes beyond the first free repeat they may for the reduced tuition fee of \$300.

CFP Exam Registration

Students must register with the Certified Financial Planner Board of Standards Inc. to take the exam. Kaplan Financial is neither responsible nor liable for a failure to register or for any refusal by CFP Board to accept an application. Please call 800-487-1497 or visit the CFP Board web site at www.CFP.net/become.

Acceptance of Live Review Terms & Conditions

To enroll, please sign your name and today's date.


(1) Read all the terms and conditions of the Enrollment Agreement before signing.

(2) We advise you to keep a copy of this Enrollment Agreement for your records.

SIGNATURE _____ DATE _____

PRINT NAME _____

¹ Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and federally registered  in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.

Kaplan University does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and  certification marks. CFP certification is granted only by Certified Financial Planner Board of Standards Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met its ethics, experience and examination requirements.

Kaplan Financial and Kaplan University are review course providers for the CFP® Certification Examination administered by Certified Financial Planner Board of Standards Inc. CFP Board does not endorse any review course or receive financial remuneration from review course providers.

Kaplan Review for the CFP® Certification Examination Materials

LIVE REVIEW STUDENTS MUST PURCHASE PRE STUDY MATERIALS SEPARATELY. THE MINIMUM REQUIREMENT STUDENTS MUST PURCHASE IS THE SILVER PACKAGE. SAVE MORE MONEY BY PURCHASING THE PLATINUM PACKAGE AND RECEIVE OUR MOST POPULAR STUDY MATERIALS.

Platinum Package		Gold Package		Silver Package		
Volumes I-VI Volume VII – Case Book Volume VIII – Mock Exams & Solutions Understanding Your Financial Calculator Financial Planning Flashcards Drill & Practice Software		Volumes I-VI Volume VII – Case Book Volume VIII – Mock Exams & Solutions Understanding Your Financial Calculator Financial Planning Flashcards		Volumes I-VI Volume VII – Case Book Volume VIII – Mock Exams & Solutions		
Total	\$1,049	Total	\$800	Total	\$602	
Package Price	\$599	Package Price	\$499	Package Price	\$399	
% Discount	43%	% Discount	38%	% Discount	34%	
				Quantity	Unit Price	Total
Platinum Review Package					\$ 599.00	
Gold Review Package					\$ 499.00	
Silver Review Package					\$ 399.00	
Understanding Your Financial Calculator					\$ 49.00	
Mock Exam and Solutions					\$ 69.00	
Financial Planning Flashcards					\$ 149.00	
Drill & Practice Software					\$ 249.00	
Audio Review: Fundamentals					\$ 49.00	
Audio Review: Insurance					\$ 49.00	
Audio Review: Investments					\$ 49.00	
Audio Review: Income Tax Planning					\$ 49.00	
Audio Review: Retirement (available October 1, 2007)					\$ 49.00	
Audio Review: Estates (available October 1, 2007)					\$ 49.00	
Audio Review: Super Six Package					\$ 199.00	
Audio Review: Audio Super Six with purchase of Platinum Package					\$ 149.00	
Assessment Exam (without purchase of package)					\$ 49.00	
Assessment Exam (with purchase of any package)					\$ 25.00	
We guarantee immediate refund of all reusable items returned within 45 days from invoice date. Shipping charges are non-refundable		Continental USA Shipping Charges* All orders are shipped via ground delivery unless instructed otherwise. AK, HI, PR and overseas customers, please call for Shipping Charges.		SHIPPING CHARGE*		
		Single items: \$10.00 for first item; \$3.00 Additional item.		SUBTOTAL		
		Shipping – 1 Package (multiple packages call for shipping charge)		STATE AND LOCAL SALES TAX		
		Ground \$18.00 Second Day 38.00 Next Day PM 56.00		APPROXIMATE TOTAL		

* Shipping Charges are subject to change

Kaplan Review for the CFP® Certification Examination Materials Payment Options

- USE SAME BILLING INFORMATION AS LIVE REVIEW PAYMENT OPTIONS
- CREDIT CARD OR BANK CARD: Visa MasterCard American Express Discover
 CARD NUMBER _____ EXP DATE _____
 SIGNATURE _____
- CHECK OR MONEY ORDER:** When paying by check or money order, the full tuition rate is due with your completed application. Please make check payable to Kaplan Financial and mail to 30 S. Wacker, Suite 2500, Chicago, IL 60606-1719, Attn: Enrollment Advisor. Be sure to include a completed enrollment form with payment.