KAPLAN UNIVERSITY

Certificate in Financial Planning Program
Transfer Credit / Course Exemption Evaluation Form

Name:	**Date:**
Email:	**SS#:**
Mailing Address:	

Please check all courses that you would like to be evaluated for course exemption:

FP101: Fundamentals of Personal Financial Planning

☐ FP102: Insurance and Employee Benefits

☐ FP103: Investment Planning

☐ FP104: Income Tax Planning

☐ FP105: Planning for Retirement

☐ FP106: Estate Planning

Total # of courses evaluated: _____ (1, 2, 3, 4, 5,or 6)

Total Cost: _____ X$25 = _____ (If evaluating 4,5 or 6 courses, total cost is $100)
(# above) Total Cost (Maximum cost $100)

Please send this form in with the following three items below:

[1] ☐ $25/$50/$75/$100 Non-Refundable Fee (Please indicate payment type below: Check or Credit Card)

☐ Check enclosed (Please make check payable to Kaplan College)

☐ Credit Card (Check One Below)
☐ Visa ☐ MasterCard ☐ American Express ☐ Discover ☐ Debit Card

Card # : _____

Expiration Date: _____ _____
Month Year

Total: _____

Signature: _____

[2] ☐ Transcript/s

Institution/s Name/s: _____

_____

[3] ☐ Course Descriptions

Please attach detailed course descriptions. Legal course descriptions are needed from the above institution(s) to evaluate whether your course or courses are transferable into Kaplan University curriculum.

Please mail, fax, or email this form along with the three above items to:
Kaplan University
ATTN: School of Financial Planning
6409 Congress Ave.
Boca Raton, FL 33487
Fax # 1-800-878-5704
rtharp@kaplan.edu

Admissions
ROBERT THARP
TEL: 866-458-2007