Advocis®

Prior Learning Assessment and Recognition Form

Please note that only courses or designations based on Canadian law and the Canadian financial services industry will be reviewed.

Identifying Information

☐ Mr. ☐ Ms. ☐ Miss ☐ Mrs.

FIRST NAME	INIT.	LAST NAME	ADVOCIS ID NO.

Mailing Address

This address is: ☐ Business ☐ Home

COMPANY NAME			
STREET ADDRESS	CITY	PROV.	POSTAL
BUS. TELEPHONE	FAX	EMAIL	

Course Exemption

Please indicate the program you are seeking equivalency for:

- ☐ **CLU®: Chartered Life Underwriter***
- ☐ **CHS®: Certified Health Insurance Specialist**
- ☐ **Advocis CFP® Certification Program**

* If you have one of the following designations and are looking to enrol in the CLU Designation Program, you are exempt from completing the CLU Pre-requisite Learning:

FPSC Level 1 Certificate, CFP, F.Pl. (Pl.Fin.), CPA, CFA, CMA, CGA, or CA Designation

To enrol in the CLU program, send proof of designation in good standing to info@advocis.ca.

Supporting Documentation

Please include the following with your application:

Designation: ☐ Letter of Good Standing for _____

Course/Program:

- ☐ Certificate of Completion/Transcript (completed within the last 4 years), and
- ☐ Detailed syllabus/table of contents of the course material for assessment purposes

Payment Information

Applicable Fees*

Course Exemption: $75 administration + $75 for each exemption granted (plus GST/HST)

Recognition of External Designations: $100 (plus GST/HST)

GST/HST #R107625378

I authorize Advocis to charge my credit card the non-refundable $75 administrative fee upon receipt of this form and $75 for each exemption granted upon my acceptance.

CARD NO.	EXPIRY DATE

Checking box below constitutes your signature.

☐ SIGNATURE ☐ DATE

VISA ☐ Master Card ☐ AMEX

Send Completed Form To:

Payments by credit cards can be submitted via fax or email:

Fax: 416.444.8031

Email: EduContent@advocis.ca

Electronic Communications Consent

I consent to receive commercial electronic message from Advocis, The Financial Advisors Association of Canada, together with its subsidiaries and affiliates, including but not limited to The Institute, GAMA International Canada, Advocis Protective Association, and Advocis Broker Services. I understand that I can opt-out or update my email preferences at any time by contacting Advocis at the address or email provided on this form.

For more information visit www.advocis.ca, email: info@advocis.ca or call 416.444.4449 or 1.877.773.6765