Advocis®

Chartered Life Underwriter (CLU) Designation Registration Form

The Institute™ for Advanced Financial Education

Personal Information

❑ Mr. ❑ Ms. ❑ Miss ❑ Mrs.

First Name | Initial | Last Name

ID No. (if applicable)

Mailing Address

This address is: Business Home

Company Name

Street Address | City | Province | Postal Code

Business Telephone | Fax | Email Address

Course Selection

COURSE AND TEXTBOOKS	COURSE FORMAT	COST (Add GST/HST) MEMBER	COST (Add GST/HST) NON-MEMBER
❑ **231 Financial Planning Fundamentals** (Modules 1, 2, 3, 4)	Online	$ 450.00	$ 525.00
❑ **232 Contemporary Practices in Financial Planning** (Modules 5, 6, 7, 8)	Online	$ 450.00	$ 525.00
❑ **233 Comprehensive Practices in Risk and Retirement** (Modules 9, 10, 11, 12, 13, 14)	Online	$ 450.00	$ 525.00
❑ **234 Wealth Management & Estate Planning** (Modules 15, 16, 17, 18, 19)	Online	$ 450.00	$ 525.00
❑ **235 Advanced Taxation** TEXTBOOKS ❑ Tax Guide for Investment Advisors (#235TG) ❑ Canadian Taxation of Life Insurance (#235CTL)	Online	$ 560.00 $ 52.00 $ 104.00	$ 794.00 $ 52.00 $ 104.00
❑ **236 Law** TEXTBOOKS ❑ Legal Fundamentals for Insurance and Financial Advisors (#006502)	Online	$ 560.00 $ 74.95	$ 794.00 $ 99.95
❑ **237 Applied Estate Planning** TEXTBOOK ❑ Planning for Business Owners and Professionals (#060400)	Paper only	$ 560.00 $ 59.95	$ 794.00 $ 99.95
	SUBTOTAL		
	SHIPPING AND HANDLING (PER COURSE) (Regular price: $15.00 – Expedited price: $30.00)		
	ADD GST/HST (GST No. R107625378)		
	TOTAL (FEES MUST BE REMITTED IN FULL)		

NOTES:
- Prices subject to change without notice.
- Students are required to remit the total fees and cost of textbooks, if ordered, at the time of application.
- Please allow 5 to 10 business days from receipt of application for delivery of materials.
- Students wishing to cancel courses are required to submit written notice and return all course materials in the original packaging, within 45 days of registration. A cancellation fee of $75.00+GST/HST applies to all cancellations.

Online – Final examination must be completed within four months of the enrolment date. No extensions are allowed. Students require Internet access and an email address to take the course in this format.
Paper – For paper-based option, please contact member services for information on taking module tests and the final exam at 416.444.4449, 1.877.773.6765 or visit www.advocis.ca for more details.

Affirmation and Payment Information

Institute Student Attestation:

- I hereby understand that by enrolling in The Institute's designation program that I am hereby expected to abide by and respect the principles embedded in the Code of Professional Conduct (CPC). I hereby understand that should I successfully obtain the CLU designation through The Institute that I would be required to maintain the designation by:
  - paying the annual designation fee.
  - adhering to the Code of Professional Conduct.
  - maintaining 30 hours of Continuing Education annually.

TOTAL AMOUNT (including applicable taxes): $ ____.__

PAY BY CREDIT CARD:
I authorize Advocis to charge my credit card for the total fee:

❑ VISA ❑ MasterCard ❑ AMEX

CARD NO. | EXPIRY DATE

☒ Signature _____ ☒ Date MM/DD/YYYY

OR

PAY BY CHEQUE:

I enclosed the following (Payable to Advocis) for the total fee:

❑ Certified/Company Cheque ❑ Money Order

NOTE: Please allow 5-10 days from receipt of application for delivery of materials.

Send Completed Form To

Payments by credit cards can be submitted using this address or fax number:

Mail To: 390 Queens Quay West, Suite 209 • Toronto, ON • M5V 3A2 **OR**
Fax: 416.444.8031

Payments by cheques can be submitted using this address:

Mail To: P.O. Box 57577, Station A • Toronto, ON • M5W 5M5

Privacy Statement

Your privacy is important to us. Advocis collects, uses or discloses your personal information for the purposes identified in the Advocis Privacy Policy. Unless you instruct us otherwise, your personal information including email address and your telephone or fax number may be used for marketing, including telemarketing, 1) Advocis and TFAAC Group entity products and services and 2) third-party products and services that may be of interest to you. If you do not wish to receive any communications related to the marketing of Advocis and third-party products and services, please complete the web page in the members' website indicating your opting out choices. To view the Advocis Privacy Policy, visit www.advocis.ca.

For more information please visit www.iafe.ca or email: info@iafe.ca

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