



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. Advocis ID no.

First Name _____ Initial _____ Last Name _____

Mailing Address This address is: Business Home

Company Name _____

Street Address _____

City _____ Province _____ Postal Code _____

Telephone _____ Fax _____ Cell _____

Email Address _____

Course Exemption

Please indicate the program you are seeking equivalency for:

- CLU®: Chartered Life Underwriter* * 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 Certificant, CFP, F.PI. (PI.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.
- CHS®: Certified Health Insurance Specialist
- Advocis CFP® Certification Program

Supporting Documentation

Please include the following with your application:

Designation: Letter of Good Standing for _____

Course/Program:

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

Payment Information

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.

Applicable Fees*

Course Exemption: \$75 administration + \$75 for each exemption granted (plus GST/HST) GST/HST #R107625378
*Please note that applicable fees will be processed once assessment has been completed (within 10 business days).

I authorize Advocis, on behalf of The Institute, to charge my credit card for the total fee:

VISA MasterCard AMEX

Card No. Expiry Date Signature _____ Date _____

Send Completed Form To:

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

Email: EduContent@advocis.ca

Electronic Communications Consent

I consent to receive commercial electronic messages from Advocis, The Financial Advisors Association of Canada, together with its subsidiaries and affiliates, including but not limited to The Institute for Advanced Financial Education, 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.