



POLICY FOR TRANSFER OF COURSE CREDIT

Transfer of courses from other programs and other institutions into the College's CFP Certification Professional Education Program may be permitted. The following information will assist you in deciding whether or not to apply for transfer of course credit. The Petition form is attached and should be used in conjunction with the current College for Financial Planning catalog. Please retain copies of these documents for later use and reference.

The Applicant is responsible for the following:

- Completing and submitting the Petition for Transfer of Course Credit. The course(s) to be transferred should be clearly indicated on the petition.
- Completing an application for enrollment for the appropriate educational program. The application is found on the College's website at www.cffp.edu under the Forms link, or you may contact the Enrollment department at 800.237.9990, option 3
- Providing an official transcript that supports the Petition for Transfer of Course Credit submitted. Delay in providing the transcript will cause a delay in the decision process.
- *Official transcripts are those that (1) are received by the College directly from the institution where the course was taken, (2) bear the raised seal or other authentication mark of the issuing institution, (3) bear a recent date of issue, (4) are signed by the Registrar or other school official, and (5) show no evidence of alteration or falsification. The transcript should not be marked "unofficial" or "issued to student."*
- Providing other supporting documents that are requested by the Transfer of Credit Committee. Supporting documents may include course descriptions, course syllabi, and other information. Transcripts and supporting documents will not be returned to the applicant. **Applicants are encouraged to supply this documentation with the Petition form.**

The College for Financial Planning is responsible for the following:

- Evaluating the course(s) indicated on the Petition for Transfer of Course Credit. The Transfer of Credit Committee will not search the transcript for transferable courses that are not indicated on the petition.
- Asking for additional information, if necessary, to determine transferability of a course.

Transfer of Course Credit Guidelines

- Courses must have been completed at a regionally accredited institution within 10 years of submission of the petition
- However, courses that include a substantial tax component must have been completed within five years, such as CFPE1103—Income Tax Planning, CFPE1104—Retirement Planning and Employee Benefits, and CFPE1105—Estate Planning.
- Course(s) transferred must have been completed with a grade of C or higher.
- A maximum of two courses may be transferred.
- Transfer of credit will not be awarded if the applicant has previously taken the College's examination over the course that is to be replaced by the transferred course(s).
- An Enrolled Agent in good standing (as defined by the Internal Revenue Service) may qualify for 3 hours of transfer credit to replace CFPE1103—Income Tax Planning. Evidence of good standing, such as a copy of a current license, must be enclosed with the Petition for Transfer of Course Credit.
- The decision of the Transfer of Credit Committee is final.

Program Cost

If transfer credit is approved the student is responsible for purchasing the remaining courses in the program to which he or she is applying.

Transfer Options

The table below indicates a sample of transfer options that have been approved by the College; however, all petitions must be individually approved by the Transfer of Credit Committee and conform to the additional criteria in the table.

Please be aware the Transfer of Credit Committee will not consider work or life experience. Licenses, with the exception of Enrolled Agent, or registration will not be considered for transfer credit. However, courses leading toward the license or registration may qualify if approved by the committee.

Sample of Transfer Options

Source of the Transfer of Credit – Sample Course Numbers	Additional Criteria	Courses Replaced by Transferred Course(s)
HS318, or 1) HS300 and 2) HS311	Completed within last 10 years	Financial Planning Process & Insurance
HS328	Completed within last 10 years	Investment Planning
HS321	Completed within last 5 years	Income Tax Planning
HS326	Completed within last 5 years	Retirement Planning & Employee Benefits
HS330	Completed within last 5 years	Estate Planning



Petition for Transfer of Course Credit

Please attach this form to the complete program application form. Do not use this form if you are applying for the Master of Science degree program.

The information on this petition will not be presented to the Transfer of Credit Committee until official transcripts that support the petition have been received. This form, and official transcripts, should be sent to **Office of the Registrar, College for Financial Planning, 8000 E. Maplewood Ave., Suite 200, Greenwood Village, CO 80111**. You may also fax your completed Petition for Transfer of Course Credit to 602.824.6841.

I. Personal Information

Name:		Social Security Number: XXX-XX-	
Address:			Student ID Number:
City, State, Zip Code:			
Email Address			Mobile phone:
Business Phone:	Home Phone:	Fax Number:	

II. Transfer of Course Credit

Please arrange to have official transcripts mailed **directly** to the address above from the college(s) or university(s) listed below. Transcripts that are issued to students, faxed, or e-mailed will not be accepted for evaluation. A delay in receiving transcripts will result in a delay in receiving results of the evaluation.

List the College's CFP education program course to be replaced by the transferred course(s), the institution where the course(s) was taken, and the specific course(s) you wish to have evaluated for transfer of course credit.

A. College for Financial Planning CFP Certification Professional Education Program course to be replaced:				
Institution where the course was taken:				
Course Number/Code	Course Name	Credit Hours	Grade	Completion Date
College Use: Approved: _____			Date: _____	

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B. College for Financial Planning CFP Certification Professional Education Program course to be replaced:				
Institution where the course was taken:				
Course Number/Code	Course Name	Credit Hours	Grade	Completion Date
College Use: Approved: _____			Date: _____	

List supporting documents and other documents included.

III. Education History

From what institution did you receive your bachelor's degree?

In what year? _____

IV. Agreement and Signature

I understand that all information will be reviewed by the Transfer of Credit Committee or its designee and that the decision of the Committee will be final. Additional information may be requested, and it is my responsibility to provide such information as requested by the Committee. I attest to the truth and accuracy of the information contained in this petition for transfer. If a transfer of course credit is accepted, I will not hold the College for Financial Planning responsible for my failure on any subsequent examination.

Signature _____ Date _____