



## Certified Financial Planner Professional Education Program Transfer of Course Credit Petition

### Transfer of Course Credit Policy

If you have completed relevant courses elsewhere, they may be accepted for transfer of course credit into the CFP Certification Professional Education Program. A maximum of two courses may be transferred for credit.

You may petition for a transfer of course credit by submitting this form and required documents no later than 30 days from your enrollment into the CFP Certification Professional Education Program (or initial CFP course). The College will determine the acceptability of transfer credit on a case-by-case basis, based on the review by the Transfer of Credit Committee and determination of whether the transfer course is comparable in content to the College course it would replace. Acceptable sources of transfer credit are formal academic graduate and undergraduate-level courses, and certain certificate-level education program courses. Sources of transfer credit that are not acceptable include licenses, registrations, and work and life experience. Transfer credit will not be awarded in instances where a student has failed an attempted exam within the course or been enrolled in the program/initial course for more than 30 days. Transfer credit accepted into the CFP Certification Professional Education Program will not articulate into the College for Financial Planning graduate degree programs. Please refer to the transfer credit policy within the Graduate Degree Program [Student Handbook](#) for information on how to petition for a review of credits when applying our graduate degree program.

### You are responsible for:

1. Completing and submitting the Transfer of Course Credit Petition form with the course(s) to be evaluated clearly indicated. Fax your completed Transfer of Course Credit Petition to **602-824-6841** or email to [CFFP\\_Registrar@cffp.edu](mailto:CFFP_Registrar@cffp.edu).
2. Providing official transcripts and a course description or syllabus from the year you attended the course(s). Official transcript must be received by the College directly from the institution where the course was completed. Score Reports and transcripts marked unofficial or issued to the student are not accepted. Official transcript must be issued directly to: **Office of the Registrar**      **electronic transcripts: CFFP\_Registrar@cffp.edu**  
**College for Financial Planning**  
**9000 E. Nichols Ave., Suite 200**  
**Centennial, CO 80112**

### Transfer of Course Credit Petition

Your petition will be presented to the Transfer of Credit Committee only after your official transcripts and required documents are received.

<b>Name:</b>		<b>Student ID:</b>		
<b>Address 1:</b>		<b>Phone:</b>		
<b>City, State, Zip</b>		<b>Email:</b>		
<b>Institution(s) Attended:</b>		<b>Name on transcript (if different):</b>		
Course Information – Requested for Review		Equivalent College for Financial Planning Course	COLLEGE USE ONLY	
Course Number	Course Title		Approved	Denied
		CFPE501 – Financial Planning Process & Insurance		
		CFPE502 – Investment Planning		
		CFPE503 – Income Tax Planning		
		CFPE504 – Retirement Planning & Employee Benefits		
		CFPE505 – Estate Planning		

### Agreement & Signature

I understand all information provided will be reviewed by the Transfer of Credit Committee or its designee, and that the decision of the committee is final. It is my responsibility to provide additional information as requested. I attest to the truth and accuracy of the information contained in this form.

<b>Signature</b>		<b>Date</b>	
<b>COLLEGE USE ONLY</b>		Processing	
Registrar	Date	<input type="checkbox"/> Student Notification Sent <input type="checkbox"/> Approved Credit Entered within Student Record <input type="checkbox"/> Uploaded to Attachments within Student Record	
Assistant Registrar	Date	Processed By (initials):	Date: