

The Institutes' Waiver Request Form



For approval, please submit:

- This application form (*both sides completed*) to:
The Institutes
Attn: Sandy Bowman
720 Providence Road, Suite 100
Malvern, PA 19355-3433
- An official transcript for a designation or a graduate degree.* *The only acceptable way to submit electronic transcripts is from an official electronic transcript service through the organization or college/university. No photocopies, facsimiles, screen shots, or forwarded emails will be accepted.* This electronic transcript must be sent from the organization or the college or university directly to **Assessments@TheInstitutes.org**.
- Payment of the \$175 application processing fee for each individual waiver granted (U.S. dollars).

*Students with a CFA or CPA can submit a current designation letter on the awarding organization's letterhead or a copy of their current license

Because of the dynamic nature of The Institutes' courses and programs, waivers granted are subject to continuous review and may change without notice at any time.

Please allow two weeks for processing once all documentation has been received.

Applicant's Full Name: _____
(Last) (First) (MI)

If your transcript is under a different last name, please indicate that name here: _____

Applicant ID Number: _____

Employer: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Home Address Business Address

Daytime Telephone: _____

Email Address: _____

- Transcript has been ordered.
- Enclosed is my check or money order, made payable to **The Institutes**.
- Charge my Company Account Number: _____
Company Name: _____
- Charge my:
 MasterCard Visa American Express Discover Diners Club Electronic Funds Transfer
- Account Number: _____
- Expiration Date: _____
- Cardholder Signature: _____

The Institutes accept the following to earn exam credit for our programs:

Professional Designations or Advanced or Graduate College Degrees	Description	Exam Credit Earned in Institutes Program	Requested Waiver
ACAS or FCAS	Associate (or Fellow), Casualty Actuarial Society <i>Students who have already used their ACAS or FCAS to waive CPCU 540 are not eligible for this elective waiver.</i>	CPCU Electives Requirement Only	<input type="checkbox"/>
ACII or FCII	Associate, Chartered Insurance Institute or Fellow, Chartered Insurance Institute	CPCU Electives Requirement	<input type="checkbox"/>
CIP	Chartered Insurance Professional (Insurance Institute of Canada)	CPCU Electives Requirement	<input type="checkbox"/>
CA1 and CA2 <i>Must have credit for both courses to earn the waivers</i>	The Institutes Online CA1 and CA2 Examinations— See http://www.TheInstitutes.org/cas.htm CA1—Risk Management and Insurance Operations CA2—Insurance Accounting, Coverage Analysis, Insurance Law, and Insurance Regulation	CPCU 500 and CPCU 520 <i>(The fee for the two CPCU waivers is \$350.)</i>	<input type="checkbox"/>
CFA	Chartered Financial Analyst	CPCU Electives Requirement	<input type="checkbox"/>
CIC	Certified Insurance Counselor	AAI 81	<input type="checkbox"/>
CLU, ChFC, CEBS, CFP	Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Employee Benefit Specialist (CEBS), Certified Financial Planner	CPCU 556	<input type="checkbox"/>
CPA	Certified Public Accountant	CPCU Electives Requirement	<input type="checkbox"/>
FFSI	Fellow, Financial Services Institute	CPCU 556	<input type="checkbox"/>
FLMI	Fellow, Life Management Institute	CPCU Electives Requirement	<input type="checkbox"/>
Law Degree	Any graduate of a law school approved by the American Bar Association or any person admitted to a state bar	CPCU 530	<input type="checkbox"/>
Master's in Business Administration (MBA) OR Master's in Finance <i>Only one course may be waived for a single master's degree.</i>	Applicable advanced or master's degrees in business, finance, risk management, and insurance only (no undergraduate or MA degrees); must be from: <ul style="list-style-type: none">• Middle States Association of Colleges and Schools, Commission on Higher Education• New England Association of Schools and Colleges• North Central Association of Colleges and Schools• Northwest Association of Schools and Colleges• Southern Association of Colleges and Schools• Western Association of Schools and Colleges	CPCU 540	<input type="checkbox"/>
Master's in Financial Services	<ul style="list-style-type: none">• Non-U.S. Degrees: Contact World Education Services for a course-by-course degree evaluation: http://www.wes.org/students/index.asp	CPCU 556	<input type="checkbox"/>
Master's in Risk Management and Insurance		CPCU 500	<input type="checkbox"/>
Non-Life Fellow	Insurance Institute of India—the candidate must have passed all exams with distinction to earn the waiver.	CPCU Electives Requirement	<input type="checkbox"/>
RPLU	Registered Professional Liability Underwriter	CPCU Electives Requirement	<input type="checkbox"/>
RPLU—ASLI Electives		ASLI Electives Requirement <i>(The fee for the two ASLI electives is \$350.)</i>	<input type="checkbox"/>
WAII Diploma in Insurance	West African Insurance Institute One-Year Diploma Program	CPCU Electives Requirement	<input type="checkbox"/>