

The Institutes' Waiver Request Form

For approval, please submit:

- The completed application (both sides completed).
- An official transcript for a graduate degree or a designation.

Degree: The only acceptable way to submit electronic transcripts is from an official electronic transcript service provided by college/university and sent to directly to Assessments@TheInstitutes.org. For example: eScrip-SAFE, Parchment or Credentials Solutions. The only other option is to place the original transcript in the mail.

Designation: No photocopies, facsimiles, screen shots, or forwarded emails will be accepted. The original transcript must be sent from the organization via courier or postal service.

- A \$175 application processing fee for each individual waiver.

Send To:

The Institutes
Attn: Assessments
720 Providence Road, Suite 100
Malvern, PA 19355-3433
(610) 644-2100, ext. 7313 or fax (610) 725-5966

Important Information:

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

Student 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: _____
**State Farm does not allow charges to the company account*

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 Students who have already used their ACAS or FCAS to waive CPCU 540 are not eligible for this elective waiver | CPCU Electives Requirement Only | <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 • Higher Learning Commission, formerly the North Central Association of Colleges and Schools | CPCU 540 | <input type="checkbox"/> |
| Master's in Financial Services | <ul style="list-style-type: none"> • Northwest Commission on Colleges and Universities • Southern Association of Colleges and Schools • Western Association of Schools and Colleges | CPCU 556 | <input type="checkbox"/> |
| Master's in Risk Management and Insurance | <ul style="list-style-type: none"> • Non-U.S. Degrees: Contact World Education Services for a course-by course degree evaluation: https://www.wes.org/evaluations-and-fees/education/graduate-admissions/ | CPCU 500 | <input type="checkbox"/> |
| RPLU | Registered Professional Liability Underwriter | CPCU Electives Requirement | <input type="checkbox"/> |

