

PERSONAL INFORMATION

Last Name _____ First Name _____ M.I. _____ Pref. Name _____
Home Address _____
City _____ State _____ ZIP _____ SSN: _____
Home Phone () _____ - _____ Work Phone () _____ - _____
Cell/Pager () _____ - _____ Fax () _____ - _____
Email _____

EMPLOYMENT INFORMATION

Employer _____
Job Title _____
Business Address _____
City _____ State _____ ZIP _____ Length of Time Employed _____
If less than two years, list previous employer:
Employer _____
Job Title _____
Business Address _____
City _____ State _____ ZIP _____ Length of Time Employed _____

EDUCATIONAL INFORMATION

College/University	Major	Degree	Dates of Attendance
_____	_____	_____	_____
_____	_____	_____	_____

Professional Designations: _____

Licenses or Registrations: _____

Note: A bachelor's degree is required by the CFP Board for CFP® Certification beginning March 1, 2007

_____ Initial here if you do not have a bachelor's degree – I understand that a bachelor's degree is required by the CFP Board to attain CFP® Certification.

_____ Initial here if you have an International degree – I understand that I am responsible for arranging to have my non-U.S. degree evaluated in order to meet CFP® Certification requirements.

How did you hear about our Program? Newspaper _____ TV _____ (list station) Radio _____ (list station)

Internet _____ (which site) Email Flyer _____

Referral _____ (please give name or relationship) Other _____ (please list)

Is this a career change for you? Yes No

I do I do not plan to register for the CFP Board Certification Examination

PROGRAM COST. I understand the total cost of the Financial Planner Program at Oglethorpe University is \$4,895, which consists of a \$100.00 non-refundable registration fee and \$4,795.00 in tuition (excluding books and supplies). The \$100.00 registration fee should be included with my application and is due upon acceptance into the Program. The \$100.00 fee will be returned if my application is declined. I will pay the total cost of tuition for the Program in full, due the first day of class. Otherwise, I have agreed to the terms and signed the attached Deferred Payment Agreement. If I do not pay the total cost of tuition for the Program in full on the first day of class or sign the Deferred Payment Agreement, I will pay on a course by course basis in the amount of \$950.00 per course plus the \$100.00 non-refundable registration fee.

LATE PAYMENT. I am responsible for providing the Program Office with any updates on my personal and billing information, including an updated and active credit card, even if paying by check. If paying by check, payment is due according to my selected payment schedule. I understand my credit card on file will be charged on each payment date if a check has not been delivered to the FPP Office. If my payment is past due, I will be excluded from attending class, charged a \$30.00 late payment penalty, and disallowed from sitting for any examinations. If my payment is greater than 30 days past due, I will be in default of the Deferred Payment Agreement.

DEFAULT ON DEFERRED PAYMENT AGREEMENT. In the event I am in default of the Deferred Payment Agreement (greater than 30 days past due), the balance of the full tuition (\$4795.00) and processing fee (\$180), plus the late payment penalty (\$30.00), and the cost of any course materials I have received will become immediately due and payable. Forty five days past due, I will be submitted to a collection agency and I will owe the total outstanding tuition balance and processing fee plus the late payment penalty, and incur an additional surcharge for any and all cost of collection.

WITHDRAWAL / REFUND POLICY. I understand that in order to withdraw from the Program, I must provide **written notice** to the Program Office via letter, fax or email. **MY FAILURE TO ATTEND CLASS IS NOT ACCEPTABLE AS MY WITHDRAWAL FROM THE PROGRAM.** I understand the amount due to me or payable by me upon withdrawal will be calculated using the date written notice is *received* in the Program Office; therefore, it is *my* responsibility to confirm the withdrawal request has been received. I understand the Program is priced as a comprehensive package and it in no way is intended to be valued or billed on a pro-rata basis. The number of modules I have completed is irrelevant to the total tuition due upon withdrawal. The withdrawal schedule is solely *based on the total number of days I am enrolled in the Program*, including holidays and weekends. The clock begins running on the first day of class when I originally enroll and runs continuously, regardless if I am required to resit a class or choose to suspend my attendance. **Based on the date of withdrawal, I will owe a percentage of the TOTAL TUITION, \$4795.00, according to the schedule below** (the Registration Fee and Processing Fees incurred on the Deferred Payment Plan are non-refundable and do not qualify as payment of Program tuition):

<u>Withdrawal Schedule:</u>	<u>Percentage Payment Due</u>
Withdrawal prior to the first day of class	0%
Withdrawal within days 1 – 14	5%
Withdrawal within days 15 – 45	10%
Withdrawal within days 46 – 90	20%
Withdrawal within days 91 – 150	40%
Withdrawal within days 151 – 210	60%
Withdrawal within days 211 – 300	80%
Withdrawal after day 300	100%

Based on the withdrawal schedule above, any refund due to me from the Program shall be refunded to my credit card on file. Any tuition due from me to the Program will be automatically charged to my credit card on file. If my credit card on file is invalid, the amount due is payable within 15 days of withdrawal. If the total balance due is not paid within 15 days of withdrawal, I will be submitted to a collection agency for the amount of my total outstanding tuition balance plus **any and all additional costs of collection.**

I have read and fully understand the above Enrollment Agreement for Cohort 45 of the Financial Planner Program at Oglethorpe University, beginning January 20, 2010. By signing below, I wholly and willingly agree to comply with Oglethorpe University's Enrollment Agreement. I realize my enrollment is subject to acceptance by the University.

Print Name _____

Signature _____ Date _____

University Approval _____ Date _____

Financial Planner Program
Oglethorpe University

TUITION PAYMENT OPTIONS
COHORT 45

OPTION 1: PAYMENT IN FULL. Please enroll me in the Financial Planner Program at Oglethorpe University. I understand and agree to pay the following fees in full:

Non-Refundable Registration Fee, due upon acceptance	\$ 100.00
Tuition in full, January 20, 2010	<u>\$4,795.00</u>
Total Payment in Full, excluding books and supplies	<u>\$4,895.00</u>

OPTION 2: DEFERRED PAYMENT AGREEMENT. I agree to pay the \$100.00 non-refundable registration fee and tuition of \$4,795.00, plus a \$180 processing fee, in accordance with the following Deferred Payment Agreement schedule:

	<u>Date Due</u>	<u>Amount Due</u>
Registration Fee:	Upon Acceptance	\$100.00
Payment 1:	January 20, 2010	\$995.00
Payment 2:	March 22, 2010	\$995.00
Payment 3:	May 20, 2010	\$995.00
Payment 4:	July 20, 2010	\$995.00
<u>Payment 5:</u>	<u>September 20, 2010</u>	<u>\$995.00</u>
Total Payment in Full		\$5,075.00

A credit card is **required** to secure the Deferred Payment Agreement, even if paying by check. Payment Due Dates that fall on a weekend or holiday will be due the next business day. I understand my credit card on file will be automatically charged unless I submit alternative payment to the Program Office **before the payment due date**. If my credit card is declined and I fail to submit payment before the due dates listed above, I will be charged a **\$30** late fee in addition to my payment due. I realize that **SUSPENSION OF ATTENDANCE FROM THE PROGRAM DOES NOT SUSPEND MY OBLIGATION OF PAYMENT** under the Deferred Payment Agreement.

OPTION 3: COURSE BY COURSE PAYMENT. I agree to pay the \$100.00 non-refundable registration fee and \$950.00 per course. Payment is due the first day of class for any chosen course. I understand my credit card on file will be automatically charged unless I submit alternative payment to the Program Office by the first day of class. No refund is available with this option.

Total Payment in Full (\$100 reg. fee + 6 courses) \$5,800.00

METHOD OF PAYMENT:

Payment Method: AMEX Discover MasterCard Visa Check (payable to *Oglethorpe University*)

Indicate Payment Option:

- I select **Payment Option 1** and would like to pay for the Program in full. If I am not paying with cash or by check, I have provided my credit card information and signed the Authorization Agreement below.
- I select **Payment Option 2** and would like to pay for the Program in accordance with Deferred Payment Agreement. As required, I have provided my credit card information (even if paying by check) and signed the Authorization Agreement below.
- I select **Payment Option 3** and would like to pay on a course by course basis. If paying by credit card, I have provided my credit card information and signed the Authorization Agreement below.

I have read and fully understand the payment options listed above. Based on the payment option I have selected, I hereby authorize Oglethorpe University to charge my credit card for payment for my chosen option. I understand my card will be automatically charged for any outstanding fees/balance due to the Program. If I decide to withdraw from the Program, I understand my credit card will automatically be charged for any amount due to the Program. It is my responsibility to maintain a current credit card on file, even if I plan to pay tuition balances and fees by check.

Account No. _____ Exp. Date _____

Print Name (as it appears on the credit card) _____

Signature _____ Date _____

beginning January 20, 2010

Please read the following Terms & Conditions of the Financial Planner Program at Oglethorpe University and acknowledge understanding and acceptance of the Terms & Conditions by signing page 5 of the application:

1. **PROGRAM OVERVIEW.** This Program is designed to satisfy the educational requirements of the Certified Financial Planner Board of Standards, Inc. and is presented as a comprehensive package requiring a financial and academic commitment. It is not intended to be marketed on a per class basis and therefore, is not valued or billed on a pro-rata basis. The number of modules a student has completed is irrelevant to the total tuition due.
2. **GRADES.** For each of the six modules, midterms will be administered during regular classroom hours and a final exam will be administered on Saturday, from 9:00 a.m. to 12:00 p.m. The student's grade for each module will be a weighted average of the midterm(s) and the final examination for that module.
 - a. Students must make a grade of **75** or higher to pass each module.
 - b. Students must maintain a cumulative average of **80** or higher in order to successfully complete the program.
 - c. Midterm exams cannot be retaken.
 - d. Students who score 50 or higher on a final exam are allowed a single opportunity to retake the final in an attempt to achieve a passing grade in that particular module. If, after the retake, a passing grade has not been achieved, students are **required to resit** the module.
 - e. Students who score 49 or below on a final exam are ineligible to retake the final and are required to resit the module.
 - f. Students must withdraw from a module **prior** to the midterm in order to avoid being charged a **\$200.00** resit fee.
3. **RESITTING.** Students required to resit any modules per the Grade policy explained above must re-attend the entire module from the beginning to end and sit for the midterm and final exam in order to successfully complete the Program.
 - a. Students will be charged a resit fee of **\$200 per module**.
 - b. Students are responsible for any changes in textbooks/materials.
 - c. Students must withdraw from a module **prior** to the midterm in order to avoid being charged a resit fee.
4. **RESCHEDULING EXAMS.** Students may contact the Program Office to (re)schedule examinations:
 - a. Students may reschedule (makeup) a module midterm exam or a module final exam for a fee of **\$25.00**.
 - b. Qualifying students may schedule a final exam *retake* with the Program Office for a fee of **\$50.00**.
 - c. Exam fees are payable (**by cash or check**) on the makeup or retake date prior to taking the exam. Exams may be rescheduled Monday thru Thursday, from 9:30 am to 6:00 pm; Friday from 9:30 am to 1:30 pm. Email: fpp@oglethorpe.edu.
5. **PROGRAM COMPLETION.** Students have **36 months** from their first day of class to successfully **complete** the Program. The length of the Program is approximately 18 months.
 - a. The three-year clock begins on the first day of class when the student *originally* enrolls in the Program. This date does not change, regardless if the student is required to resit a class or chooses to suspend attendance.
 - (1) i.e. John Doe enrolls with Cohort 33 which begins 01.24.06. He fails the first module, Fundamentals of Financial Planning, and must resit the class which is not offered again until Cohort 34 classes begin on 05.17.2006. In April of 2006 he is informed he will be traveling extensively for work for the next 4 months. John decides to wait until Session 35 begins on 09.11.06 to return to the Program. His 3-year window began on 01.24.06 and he must successfully complete the Program by 01.24.09.
 - b. The Program must be **COMPLETED** *within the three-year period* so students should plan their schedules accordingly. This means the last day of class of the last necessary module must be completed **within** the three-year period.
 - (1) i.e. Jane Doe begins the Program on 04.26.05 and completes and passes 5 of the 6 modules; she is lacking Estate Planning. She waits until March of 2008 to inquire about the next available Estate module and discovers it is not offered until 04.20.08. She will not be able to **complete** the class **within** the 3-year window since Estate Planning consists of 10 class meetings and it will overlap and extend beyond the three year expiration date ending on 04.26.05. Jane has NOT COMPLETED the Program within the 3-year window and therefore, will not be issued a Letter of Completion. Her enrollment in the Program has expired.
 - c. After 36 months from the student's first day of class, when the student *originally* begins the Program, **the student's enrollment in the Program EXPIRES**. The student will be removed from participating in the Program. If s/he has not successfully completed the Program within the three-year window, her/his Program status is "incomplete" and s/he will NOT receive a Letter of Completion from the Program.
 - d. After 36 months, a former student may reapply to the Program and will be subject to the Program's current Tuition Price, Terms and Condition, and space availability. The student will be required to restart the Program and will not receive credit for any modules that have been previously completed.

beginning January 20, 2010

6. **SUSPENSION OF ATTENDANCE.** Students wishing to suspend attendance to the Program are required to provide written notice of suspension to the Program Office via e-mail to: fpp@oglethorpe.edu. Students who have paid in full are **not entitled to a refund** of tuition during their suspension. Students on the Deferred Payment Agreement **will continue to be billed per their original, signed Agreement, regardless of the reason for suspension.** Students wishing to stop payment to the Program must formally withdraw from the Program (see Enrollment Agreement).
 - a. Per the Program Completion Policy above, suspension of attendance does not stop the clock on the 3-year period in which a student is allotted to complete the Program.
 - b. The length of time a student suspends attendance is at her/his discretion, so long as the Program is successfully completed *within* the 36-month period **and the Program is a going concern.**
 - c. The student must notify the Program office upon her/his return so s/he can be placed in the appropriate module.
7. **SUCCESSFUL COMPLETION.** A student has successfully completed the Program if the following criteria have been met: compliance with the Grade policy (see item no. 2 above), compliance with the Program Completion policy (see item no. 5 above) and the student is in good financial standing and has no outstanding balance due.
8. **WITHDRAWAL.** Students wishing to withdraw from the Program are required to provide **written notice** of their withdrawal to the Program Office via e-mail to: fpp@oglethorpe.edu. Please see the Enrollment Agreement for details.
9. **RE-ENTRY AFTER WITHDRAWAL.** Students who have withdrawn from the Program in good financial standing (within the first 300 days of originally starting the Program) may reapply to the Program and will be subject to the current Registration Fee, Tuition Price, Terms and Conditions. Returning students will receive a 75% credit for all tuition previously paid into the Program. The student will be required to restart the Program and will not receive credit for any modules that have been previously completed.
10. **AUDITING MODULES.** Students who have *successfully* completed the *entire* Program may audit any module, free of charge, within the three-year window from their first day of class as long as the Program is a going concern.
 - a. The three year clock begins on the first day of class when the student *originally* enrolls in the Program. This date does not change, regardless if the student needs to resit a class or suspend attendance.
 - b. Students are responsible for purchasing any new textbooks/materials and will incur a **\$25.00** fee for a current module binder.
 - c. After the 3-year window, students will be charged **\$500.00** per audited module.
 - d. Students must obtain pre-approval to audit from the Program Office; the class will be assigned on space availability.

I have read and fully understand the Terms & Conditions on pages 4 & 5 of the application for the Financial Planner Program at Oglethorpe University. By signing below, I wholly and willingly agree to comply with the Program's Terms & Conditions.

Print Name _____

Signature _____ Date _____

Please answer the following questions as required by the U.S. Department of Education.
(Your answers will not affect your acceptance into the Financial Planner Program.)

Check the appropriate boxes:

1. Gender: Female Male
2. American Citizen or permanent resident
 Nonresident alien
3. Hispanic/Latino of any race: Yes No
4. Select all that apply:
 American Indian or Alaska Native Asian Black or African American
 Native Hawaiian or Other Pacific Islander White