



Financial Planning Program Contract

READ THE FOLLOWING DOCUMENT IN ITS ENTIRETY BEFORE SIGNING. All courses are conducted in English and subject to the following policies:

Payment for the program must be made in advance of enrollment.

(1) The Financial Planning Program—both Accelerated and Traditional—consists of six different courses. Each course consists of classes that meet for a total of 37.5 hours per course. The Accelerated Program also allows for an alternative learning format whereby the student and instructor work together to help the student gain competency of the material through various means, which can include, but is not limited to, teleconferencing, videoconferencing, and correspondence.

(2) Any course may be audited, but the course must be paid for in its entirety prior to enrollment. A student's status may be switched from "enrolled" to "audit" only upon the affirmative election of the student at any point prior to the first examination of the course. Auditing allows the student to attend the course, but the student is prohibited from taking any of the examinations of the course. The student may subsequently re-enroll in the course, but the course must be paid for again.

(3) Books required for each course will be provided to the student as part of the tuition. A student must provide his or her own calculator.

(4) Cancellation and Refund Policy: once the enrollee elects to enroll in either the entire program or a single course, no refunds are allowed. An enrollee must pay in advance for either all six courses or a single course. An enrollee may withdraw from the program or a course with 10 days advance written notice delivered to the Program Director; however, no refund will be given. Instead, a credit will be given to apply to future that student's enrollment in the Financial Planning Program at Wisconsin Lutheran College. Because the student has purchased a set number of courses in the Financial Planning Program, the student—and only that student—may enroll in future courses, subject to availability. There is no guarantee that the courses will be offered or that they will be offered at times or locations that are equivalent to when the student enrolled. Should Wisconsin Lutheran College cancel a course or a program, the 100 percent of your total payments received by the date of cancellation will be refunded.

(5) Transferability: Enrollment is personal and not transferable or assignable to any other person.

(6) Evaluation and Attendance: Each course has its own evaluation policy, which is subject to change and is at the discretion of the instructor of the course. Attendance is essential to gaining competence in the material. Missing a class may require the student to complete additional work.

(7) Registration for the CFP® Certification Exam: It is the responsibility of the student to register with the Certified Financial Planner Board of Standards ("CFP Board") to take the CFP® Certification Exam. The Financial Planning Program at Wisconsin Lutheran College will confirm whether a student has completed the Program successfully. It is the responsibility of the student to register for the CFP® Certification Exam. Wisconsin Lutheran College is not responsible or liable for any act or decision taken by the student or the CFP Board.

Your Signature: _____ Date: _____

Your Name (please print): _____

PLEASE SUBMIT THIS CONTRACT WITH YOUR REGISTRATION ALONG WITH YOUR PAYMENT