



**Rattiner's Financial Planning Review Course  
for the CFP® Certification Examination  
2019/2020 Enrollment Contract**

<p><b>Student Information:</b>  <b>Name:</b> <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. _____  <b>Company:</b> _____  <b>Shipping Address:</b> <input type="checkbox"/> Business <input type="checkbox"/> Residential  Address: _____  City: _____ St: _____ Zip: _____  <b>Contact Numbers:</b>  Work: _____  Home: _____  Cell: _____  Fax: _____  <b>Email Information:</b>  Work: _____  Home: _____  <b>Referral Information:</b>  Referred by: _____  Contact Information: _____  Referred by: _____</p>	<p><b>Tuition &amp; Payment Information:</b>  <b>Location:</b> _____  <b>Review for</b> _____ <b>CFP® Exam Date</b> _____  <b>Tuition</b> (includes non-refundable \$250 administration fee):  \$1,595 – California, Hawaii and New York City  \$1,395 – Arizona, Colorado and All other states    <b>Fax or Email</b> your completed <b>Enrollment Form</b> to:  <b>(720) 221-0448</b>  <a href="mailto:jeff@jrfinancialgroup.com">jeff@jrfinancialgroup.com</a>    <b>Pay by Credit Card:</b> <input type="checkbox"/> Visa <input type="checkbox"/> M/C <input type="checkbox"/> AmEx <input type="checkbox"/> Discover  Credit Card Number: _____  Name on Card, if different: _____  Address, if different: _____  City/State/Zip if different: _____  Security Code: _____ Exp. Date: _____</p>
<p>Years of financial planning experience? _____  Education: <input type="checkbox"/> BA/BS <input type="checkbox"/> MBA/Grad <input type="checkbox"/> JD/PhD  Designations: <input type="checkbox"/> CPA <input type="checkbox"/> CFA <input type="checkbox"/> CLU <input type="checkbox"/> ChFC <input type="checkbox"/> JD <input type="checkbox"/> Other _____</p>	
<p><b>Referral Information:</b>  Referred by: _____  Address: _____  Telephone Number: _____ Email Address: _____</p>	

I hereby agree to the following terms and conditions for enrollment in Rattiner's Financial Planning Review Course for the CFP® Certification Examination:

1. The CFP® Certification Examination Review Materials will be shipped standard ground method to my provided shipping address within 7 days after payment is received by Rattiner's Financial Planning Fast Track, Inc. If I request faster delivery, I will be responsible for any additional costs. We reserve the right to delay shipment if a revision is expected prior to the class so we can insure the most up-to-date materials.
2. **Our strict refund policy is based on the shipping date of the class materials:**
  - a. Prior to shipping of the CFP® Certification Exam Review Materials: **Full refund less \$250 non-refundable administrative fee.**
  - b. After shipping of the CFP® Certification Exam Review Materials: **No Refund**
3. Class may be cancelled by Rattiner's Financial Planning Fast Track®, Inc. due to insufficient enrollment up to 60 days prior to the first scheduled class at which time I will be entitled to a full refund of the course tuition. Classes may also close without warning due to full enrollment.
4. I understand that I should receive a confirmation of my registration. (Please contact Rattiner's Financial Planning Fast Track, Inc. at (720)-529-1888 if you do not receive this confirmation within 10 days of mailing. It is suggested to send registration and payment via a traceable method.)
5. I understand that the CFP® Certification Examination Review Materials are designed to provide accurate and authoritative information in regard to the subject matter covered. I understand that Rattiner's Financial Planning Fast Track®, Inc. is not engaged in rendering legal, accounting, financial planning, or other professional services. If legal advice or other professional assistance is required, the services of a competent professional should be sought.
6. I agree that all controversies that may arise between us shall be resolved by independent arbitration. I agree to limit damages to the actual tuition fee and material costs only.
7. I understand that it is my responsibility to register with the Certified Financial Planner Board of Standards, Inc. to take the CFP® Certification Examination. Rattiner's Financial Planning Fast Track®, Inc. is not responsible or liable for a failure to register or for any refusal by the CFP® Board to accept my application.

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Student Signature

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Date