



Rattiner's Financial Planning Fast Track, Inc. 2020 Enrollment Contract

Student Information:

Name: Mr. Mrs. Ms.

Company:

Shipping Address: Business Residential

Address: _____

City: _____ St: _____ Zip: _____

Contact Numbers:

Work: _____

Home: _____

Cell: _____

Fax: _____

Email Information:

Work: _____

Home: _____

Referred by _____

Class & Payment Information:

Location: _____

Start Date: _____ for _____ Exam

Fee - \$5,650 general tuition. (\$300 discount on an enrollment form sent in at least 90 days before class start date).

Fax or Email your completed Enrollment Form to:

(720) 221-0448

jeff@jrfinancialgroup.com

Pay by Credit Card: Visa M/C AmEx Discover

Credit Card Number: _____

Name on Card, if different: _____

Address, if different: _____

Card Number: _____

Security Code: _____ Exp. Date: _____

Years of financial planning experience? _____

Designations: CFA CLU ChFC JD Other

Education: BA/BS MBA/Grad JD/PhD

Prior CFP® class/review taken: _____

I hereby agree to the following terms and conditions for enrollment in Financial Planning Fast Track (FPFT) Course for the CFP® Certification Examination:

- I may audit or retake any of the classes once I am enrolled provided:
 - I attend the majority of classes within the registered class cycle.
 - I purchase any materials that may be required and all other costs
 - I must give 21 days notice prior to the class I wish to attend.
 - I must pay any travel or lodging expense to attend the class.
 - This offer is only valid for 1 year following the registered class cycle and prior to receiving the CFP® designation.
- Initial class materials will be mailed to the address provided above. Future class material will be handed out in class. If I request subsequent materials to be mailed, I will be responsible for shipping costs. All class notes will be emailed to you. I will be responsible for printing them prior to each class. If I request a hardcopy instead, I will be billed at a rate of .10 cents per page.
- I understand once a student commits to the program, they are committing to a seat for the entire class cycle. The goal is to always conduct each class with all seats full. If a student fails to show during the class cycle, then that seat will remain vacant for the entire program and cannot be re-sold since prior classes require substantial preparation time in order to complete the program successfully. Due to these issues, our strict refund policy is based on the start date of the registered class cycle (Mar, Aug, Nov, see our web site at www.jrfinancialgroup.com for specific starting date.
 - 91 or more days prior to the start of class = 100% refund less a \$250 non-refundable administration fee
 - 90 to 76 days prior to the start of class = 75% refund less a \$250 non-refundable administration fee
 - 75 to 60 days prior to the start of class = 50% refund less a \$250 non-refundable administration fee
 - 60 days or less prior to the start of class including attending any class = 0% refund
- I understand there may be a higher tuition if 10 people are not enrolled for the program. In no event will credit cards be charged until the program is definitely a go and the student receives a phone call or e-mail asking to sign off on the amount that will be charged to his or her card.
- Should I not be able to attend a particular class, FPFT will work with me to the best of their ability to place me into another group or location for the missed class if any are available. If no classes are available, I may have to attend and pay for another program myself to make up the missed class. However, there is no guarantee that I will be able to attend the next scheduled class. As a result, this may extend my class cycle beyond my initially expected CFP Certification Examination date. I will be solely responsible to notify FPFT about re-scheduling any missed classes.
- Class may be canceled by FPFT 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.
- I understand that I should receive a confirmation of my registration. (Please contact 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.)
- 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 FPFT 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.
- 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. I also understand that I may be required to pay court costs and legal fees should I pursue frivolous legal action.
- I understand that it is my responsibility to register with the Certified Financial Planner Board of Standards, Inc. to take the CFP® Certification Examination. FPFT is not responsible or liable for my failure to timely register for the exam or for any refusal by the CFP Board to accept my application.

Student Signature: _____ Date: _____