



**Rattiner's Financial Planning Review Course
for the CFP® Certification Examination
2020/2021 Enrollment Contract**

<p>Student Information: Name: <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. _____ Company: _____ Shipping Address: <input type="checkbox"/> Business <input type="checkbox"/> Residential Address: _____ City: _____ St: _____ Zip: _____ Contact Numbers: Work: _____ Home: _____ Cell: _____ Fax: _____ Email Information: Work: _____ Home: _____ Referral Information: Referred by: _____ Contact Information: _____ Referred by: _____</p>	<p>Tuition & Payment Information: Location: _____ Review for _____ CFP® Exam Date _____ Tuition (includes non-refundable \$250 administration fee): \$1,595 – California, Hawaii and New York City \$1,395 – Arizona, Colorado and All other states Fax or Email your completed Enrollment Form to: (720) 221-0448 jeff@jrfinancialgroup.com Pay by Credit Card: <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>
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 _____	
Referral Information: Referred by: _____ Address: _____ Telephone Number: _____ Email Address: _____	

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.

Student Signature

Date