

The Institutes' Waiver Request Form

For approval, please submit:

- The completed application (both sides completed).
- An official transcript for a graduate degree or a designation.
 - ▶ **Degree:** The only acceptable way to submit electronic transcripts is from an official electronic transcript service provided by a college/university and sent directly to Assessments@TheInstitutes.org. For example: eScrip-SAFE, Parchment, or Credentials Solutions. The only other option is to place the original transcript in the mail.
 - ▶ **Designation:** No photocopies, facsimiles, screen shots, or forwarded emails will be accepted. The original transcript must be sent from the organization via courier or postal service.
- A \$175 application processing fee will apply for each individual waiver.

Send to:

The Institutes
Attn: Assessments
720 Providence Road, Suite 100
Malvern, PA 19355-3433
Assessments@TheInstitutes.org

Important Information:

- Because of the dynamic nature of The Institutes' courses and programs, and those of the granting organization, waivers granted are subject to continuous review and may change without notice at any time.
- Students with a CFA or CPA can submit a current designation letter on the awarding organization's letterhead or a copy of their current license.
- Please allow two weeks for processing once all documentation has been received.
- **Once your waiver has been approved, you will be contacted by The Institutes for payment via credit card for the waiver fee.**

Applicant's Full Name: _____
(Last) (First) (MI)

If your transcript is under a different last name, please indicate that name here: _____

The Institutes ID Number: _____ Employer: _____

Address: _____ City: _____

State: _____ Zip Code: _____ Home Address Business Address

Daytime Telephone: _____ Email Address: _____

Transcript has been ordered. Enclosed is my check or money order, made payable to The Institutes.

Charge my Company Account Number: _____ Company Name: _____

*State Farm does not allow charges to the company account.

The Institutes accept the following to earn exam credit for our programs:

Professional Designations or Advanced or Graduate College Degrees	Description	Exam Credit Earned in Institutes Program	Requested Waiver
ACAS or FCAS	Associate (or Fellow), Casualty Actuarial Society	CPCU [®] Electives Requirement Only	<input type="checkbox"/>
CAS DISC RM and CAS DISC IA Must have credit for both courses to earn the waivers	The Institutes CAS DISC RM and CAS DISC IA Examinations— See https://web.theinstitutes.org/casualty-actuarial-society CAS DISC RM: Risk Management and Insurance Operations CAS DISC IA: Insurance Accounting, Coverage Analysis, Insurance Law, and Insurance Regulation	CPCU 500 and CPCU 520 (The fee for the two CPCU waivers is \$350.)	<input type="checkbox"/>
CFA	Chartered Financial Analyst	CPCU Electives Requirement	<input type="checkbox"/>
CIC	Certified Insurance Counselor	AAI 301	<input type="checkbox"/>
CLU, ChFC, CEBS, CFP	Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Employee Benefit Specialist (CEBS), Certified Financial Planner (CFP)	CPCU 556	<input type="checkbox"/>
CPA	Certified Public Accountant	CPCU Electives Requirement	<input type="checkbox"/>
FFSI	Fellow, Financial Services Institute	CPCU 556	<input type="checkbox"/>
FLMI	Fellow, Life Management Institute	CPCU Electives Requirement	<input type="checkbox"/>
Law Degree	JD graduate of a law school approved by the American Bar Association or any person admitted to a state bar	CPCU 530	<input type="checkbox"/>
Master's in Business Administration (MBA) OR Master's in Finance Only one course may be waived for a single master's degree.	Applicable advanced or master's degrees in business, finance, risk management, and insurance only (no undergraduate or MA degrees); must be from: • Middle States Association of Colleges and Schools, Commission on Higher Education • New England Association of Schools and Colleges • Higher Learning Commission, formerly the North Central Association of Colleges and Schools • Northwest Commission on Colleges and Universities	CPCU 540	<input type="checkbox"/>
Master's in Financial Services	• Southern Association of Colleges and Schools • Western Association of Schools and Colleges • Non-U.S. Degrees: Contact World Education Services for a course-by-course degree evaluation: https://www.wes.org/evaluations-and-fees/education/graduate-admissions/	CPCU 556	<input type="checkbox"/>
Master's in Risk Management and Insurance		CPCU 500	<input type="checkbox"/>
RPLU	Registered Professional Liability Underwriter	CPCU Electives Requirement	<input type="checkbox"/>
RPLU—ASLI Elective		ASLI Elective Requirement	<input type="checkbox"/>

