



Financial Perspectives

29th INTAKE (JUL/AUG 2010 Exam)

ENROLMENT FORM



Please complete the entire form in BLOCK LETTERS and tick or delete (*) where applicable

New Student _____ Others _____

| FOR FP's OFFICIAL USE: | | Class: M | PT / SS | Staff: |
|------------------------|---------|------------------|-----------------------|--------|
| FP's Invoice _____ | | Collected SG | 1 / 2 / 3 / 4 / 5 / 6 | |
| FPAS Cheque _____ | /DIRECT | Collected CD-Rom | 1 / 2 / 3 / 4 / 5 / 6 | |
| | | Collected Kit | 1 / 3 | |

PERSONAL PARTICULARS

Full Name (as in NRIC): please underline Surname _____

Dr / Mr / Mrs / Ms *

NRIC/ Passport No.*: _____ Nationality: Singaporean PR Others (please specify): _____

Sex: Female / Male * Marital Status: Single / Married * Date of Birth: _____ DD _____ MM _____ YY

Preferred Mailing Address (P.O. Box not accepted): _____

Email Address for Official Correspondence (must be provided): _____

Mobile No: _____ Tel (H): _____ Fax: _____

EMPLOYMENT DETAILS

Sponsored: No / Yes (if yes, please state Group/Company name: _____)

Name of Company: _____ + Charter Member: Others:

Office Address: _____

Designation: _____ Industry: _____ Years Employed: _____

Tel (O): _____ Ext: _____ DID: _____ Fax (O): _____

+ Please submit original letter from employer

EDUCATIONAL QUALIFICATION DETAILS

Minimum entry requirement for the AFP^{CM}, AWP^{CM} & CFP[®] Certification Program is a full GCE 'A' Level Certificate OR at least 3 years working experience.

In satisfaction of the Admission Requirements, I enclose a 'CERTIFIED TRUE' copied certificate of my Highest Level of Education attained:

3 years working experience GCE 'A' Levels Diploma Degree Professional/Others: _____

(Original letter from employer)

(Minimum 2 'A's, 2'O's)

ORDER OF STUDY MATERIALS

I wish to receive the Study Materials for the Modules indicated below:

Module 1 - Foundations in Financial Planning Module 2 - Risk Management & Insurance Planning Module 3 - Tax Planning & Estate Planning Module 4 - Investment Planning Module 5 - Retirement Planning Module 6 - Financial Plan Construction & Professional Responsibilities

Study Materials Delivery Instructions:

(Delivery charge of \$15 per module is applicable for Singapore only. Delivery time is approx. 10 days after processing of enrolment form)

Self Collect Deliver to Home / Office * (Please state address if different from above)

S()

ORDER OF EXAM PREP/ REVISION KIT

• AFP^{CM} Exam Prep Kit (For Module 1 only)

The AFP^{CM} exam prep kit is a supplement to the Study Guide. It will be an invaluable tool for students taking the CFP[®] Module 1 Exams.

I wish to buy a copy of "AFP^{CM} Exam Prep Kit" \$48.00 **FREE for New Students**

• Revision Kit (For Module 3 only)

The kit is a supplement to the Study Guide. A set of mock exam questions with step-by-step worked solutions will enhance the learning process.

I wish to buy a copy of "Module 3 Revision Kit" \$30.00 **FREE for New Students**

Published by Financial Perspectives.

For Limited Period Only

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AFP^{CM}, AWP^{CM} & CFP[®] PROGRAM FEES

Tick where applicable. Fees are NETT.

w.e.f. from March 2010

* NCM Fees apply to Foreign Student

| CFP [®] Certification Program ¹ | Charter / Corporate Members | | | | Others * | | | |
|---|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| | Self-Study | | Classroom-Based | | Self-Study | | Classroom-Based | |
| | CD | Study Guide & CD ⁺ | CD | Study Guide & CD ⁺ | CD | Study Guide & CD ⁺ | CD | Study Guide & CD ⁺ |
| Module 1 (AFP) ² | <input type="checkbox"/> \$ 415 | <input type="checkbox"/> \$ 465 | <input type="checkbox"/> \$ 615 | <input type="checkbox"/> \$ 665 | <input type="checkbox"/> \$ 485 | <input type="checkbox"/> \$ 535 | <input type="checkbox"/> \$ 680 | <input type="checkbox"/> \$ 730 |
| Module 2 | <input type="checkbox"/> \$ 415 | <input type="checkbox"/> \$ 465 | <input type="checkbox"/> \$ 580 | <input type="checkbox"/> \$ 630 | <input type="checkbox"/> \$ 485 | <input type="checkbox"/> \$ 535 | <input type="checkbox"/> \$ 680 | <input type="checkbox"/> \$ 730 |
| Module 3 | <input type="checkbox"/> \$ 415 | <input type="checkbox"/> \$ 465 | <input type="checkbox"/> \$ 580 | <input type="checkbox"/> \$ 630 | <input type="checkbox"/> \$ 485 | <input type="checkbox"/> \$ 535 | <input type="checkbox"/> \$ 680 | <input type="checkbox"/> \$ 730 |
| Module 4 | <input type="checkbox"/> \$ 415 | <input type="checkbox"/> \$ 465 | <input type="checkbox"/> \$ 580 | <input type="checkbox"/> \$ 630 | <input type="checkbox"/> \$ 485 | <input type="checkbox"/> \$ 535 | <input type="checkbox"/> \$ 680 | <input type="checkbox"/> \$ 730 |
| Module 5 | <input type="checkbox"/> \$ 415 | <input type="checkbox"/> \$ 465 | <input type="checkbox"/> \$ 580 | <input type="checkbox"/> \$ 630 | <input type="checkbox"/> \$ 485 | <input type="checkbox"/> \$ 535 | <input type="checkbox"/> \$ 680 | <input type="checkbox"/> \$ 730 |
| Module 6 ³ | <input type="checkbox"/> \$ 365 | <input type="checkbox"/> \$ 415 | <input type="checkbox"/> \$ 500 | <input type="checkbox"/> \$ 550 | <input type="checkbox"/> \$ 425 | <input type="checkbox"/> \$ 475 | <input type="checkbox"/> \$ 590 | <input type="checkbox"/> \$ 640 |
| Total | \$ 2,440 | \$ 2,740 | \$ 3,435 | \$ 3,735 | \$ 2,850 | \$ 3,150 | \$ 3,990 | \$ 4,290 |

¹ Discounts Are Applicable If You Enroll In 3 Or More Modules. Please refer to our latest "Course Fees & Special Packages". Conditions Apply.

² AFP^{CM} Package includes FREE Exam Prep Kit (M1) + Free Professional Image Management Workshop worth \$118.00

³ Conditions Apply for Module 6 fee (refer to Appendix A).

⁺ Package price applies only upon enrolment. The CD Includes: (i) Study materials in a CD-Rom format (ii) 2 Online MCQ mock exams (Except M3)

| Other Options / Products | Selection (please circle) | Charter/Corporate | Others |
|--|------------------------------|-------------------------------------|--------|
| 1. Exam Preparation Class (For Self-Study Students) | Module 1 / 2 / 3 / 4 / 5 / 6 | <input type="checkbox"/> \$ 80 each | |

PAYMENT DETAILS

| | | | |
|------------------------------------|-----------------|------------------------|---|
| Program Fees | \$ _____ | Mode of Payment: | Cash / Cheque / NETS |
| Other Options/Products | \$ _____ | Bank / Cheque No: | _____ |
| Delivery Charge (\$15 per module): | \$ _____ | Crossed and payable to | "Financial Perspectives Pte Ltd" |
| Overseas Delivery Charge: | \$ _____ | NETS Ref No.: | _____ |
| Less Discount, if any | \$ _____ | | |
| Total Amount Payable: | \$ _____ | | |

APPLICANT ENROLMENT CHECKLIST Tick where applicable

Please note that if your enrolment form is incomplete or not in compliance with this enrolment checklist, it will inevitably delay the processing of your enrolment.

- I have duly completed the FP ENROLMENT FORM and included CHEQUE made payable to "Financial Perspectives Pte Ltd".
- I have attached copies of the CERTIFICATES* or TRANSCRIPTS* (reduced to A4 size and clipped to the FP Enrolment form) for educational admission requirements or ORIGINAL LETTER from employer stating length of employment (at least 3 years).
- I have attached a Certified True Copy of CERTIFICATES* to support my application for exemption.
- I am a Charter Member, I have attached an ORIGINAL company letter verifying employment and STAFF AUTHORISATION PASS
- I have attached the completed FPAS MEMBERSHIP FORM and included CHEQUE made payable to "FPAS".

*Certificates may be certified true by your company. In such cases, please state name, NRIC number and position of the person certifying the photocopies. Certification can also be made at Financial Perspectives upon presentation of the originals.

This completed Enrolment Form and the supporting documents, together with the required payment, should be sent to

Financial Perspectives Pte Ltd
38B Circular Rd FP House Singapore 049394
Tel: (65) 6533 6121 Fax: (65) 6533 6802

I, hereby, declare that the above information is complete and correct. I understand that any misrepresentation or missing information is sufficient grounds for **Financial Perspectives** to reject my application. I have read, understood and agree to abide by all the terms and conditions in Appendix A (*Policies of Financial Perspectives and FPAS*) and I have been given a copy of Appendix A. I am also aware that the course fees do not include FPAS membership fee and the examination fee, which must be paid separately to FPAS subject to FPAS' terms and conditions.

Signature _____

Date _____

FOR OFFICIAL USE ONLY (MUST BE COMPLETED)

| | | |
|-------------------------------|--|--|
| Date: _____ | <input type="checkbox"/> Mail-in <input type="checkbox"/> Walk-in <input type="checkbox"/> Corporate | <input type="checkbox"/> FPAS Membership Form and Payment |
| Received & _____ | <input type="checkbox"/> Application Form Duly Completed | <input type="checkbox"/> FP has explained all terms & conditions to Student |
| Checked by (STAFF CODE) _____ | <input type="checkbox"/> Supporting Documents | <input type="checkbox"/> Student has read Appendix A and has been given a copy |

APPENDIX A

FINANCIAL PERSPECTIVES' GENERAL POLICIES, TERMS AND CONDITIONS

1. ADMISSION REQUIREMENTS

Applicants must hold a **FULL** GCE 'A' level certificate (minimum 2 'A's & 2 'AO's) or higher, or alternatively have at least three (3) years of general working experience.

2. PROGRAM COURSE FEES

- AFP^{CM}, AWP^{CM} & CFP[®] Certification Program course fees must be paid in full at the time of application.
- **All fees include a non-refundable / non-transferable termination fee of \$150 per module for part-time/self-study & for full-time program (No Refund of Course Fees will be allowed after 30 days of Registration Date).**
- Course fees **DO NOT INCLUDE** FPAS Student Membership fees & FPAS Examination fees & delivery charges.
- ³ **For New FP Students:** Special Module 6 pricing is applicable only if you enrol **ALL 6 CFP[®] Modules** with *Financial Perspectives Pte Ltd.*
- ³ **For Other Students:** Special Module 6 pricing is applicable for students who complete their **final 5 modules** with *Financial Perspectives Pte Ltd.*
- Charter Member rates apply only to applicants who, at the time of enrolment for each module, are solely contracted or directly employed by FPAS Charter Member companies. An original supporting letter from the company and/or current authorization employment card must be provided.

3. TERMINATION / TRANSFER / REFUND POLICY (PART-TIME / SELF-STUDY / FULL-TIME)

- Course fees are non-transferable.
- Notice of termination & deferment must be made in writing.
- **Course fees paid (excluding termination fees of \$150) will be refunded in full if written notice of withdrawal, accompanied by the Study Guides and/or Interactive CD-Rom (must not be unwrapped/opened and in original cellophane packing) is received within 30 days of original registration. No refunds will be made for cancellation after this time or for opened materials.**
- **There will be strictly No Refunds** if written notice of cancellation is not accompanied by the Study Guide(s)/CD-ROM(s) & Exam Prep Kit(s) (which must not be unwrapped/opened and must be in the original shrink-wrapped cellophane packing.)
- No Refund or Exchange will be given upon receipt of payment and upon delivery/self-collection for Updated materials, Textbooks & Exam Prep Kit (s).

4. TUTORIAL WORKSHOPS

- **Seats in tutorial workshops are limited and allocated on a first-come-first-served basis. Once enrolment is confirmed, No Switching** amongst the different workshop groups is allowed and **No Replacement Sessions** for missed classes.
- It is the student's responsibility to **register attendance with FP within 30 minutes of commencement of each tutorial.** No written/verbal request will be entertained if the student fails to comply.
- **For ¹Cancellations and ²Deferment from workshops, 30 days notice prior to the commencement of the workshop classes must be given in a written notice. An administrative fee of \$50 will be charged. No refunds/deferrals will be allowed if notice is received less than 30 days from the commencement of classes.**
- FP reserves the right to make any changes to the class schedules and to cancel any workshop if there is insufficient number of students.

^{1 & 2} Students must collect the current study materials.

5. CURRICULUM & COURSE MATERIALS UPDATES

Students will be tested on the most current study materials. Therefore, if you are going to re-sit, re-schedule or fail to appear for a scheduled examination, you are responsible for inquiring about any **new & updated study materials** and obtaining them. An administrative fee will be charged on updated materials.

6. CHANGE FROM PART-TIME TO SELF-STUDY

Notice of change must be made in writing and received 30 days before commencement of classes. Applicable and relevant course fees paid (excluding administrative charge of \$50 per module) will be refunded. **No refunds will be allowed if notice is received less than 30 days from the commencement of classes.**

APPENDIX A cont'd

FINANCIAL PERSPECTIVES' GENERAL POLICIES, TERMS AND CONDITIONS

7. FOREIGN STUDENTS

- FP will **NOT** act as sponsors for foreign students.
- Foreign Students' Applications to the AFP^{cm}, AWP^{cm} & CFP[®] Certification Programs will need to be submitted for approval to the Management at least 1 month before the course commences.

8. OFFICIAL STUDENT NOTIFICATIONS

All official notifications will be posted at our website: www.fp-edu.com. In addition, official correspondence/notices will be sent to students via their **official email address** stated in their enrolment forms.

9. CHANGE OF STUDENT PARTICULARS

Students must notify FP, in writing, of any changes in their personal particulars and addresses.

10. CHANGES

All information contained herein is correct at the time of printing. FP reserves the right to vary any or make any changes of the specified information herein or with regard to the programs in general at any time. FP's decision is final.

FINANCIAL PLANNING ASSOCIATION OF SINGAPORE (FPAS)

11. FPAS MEMBERSHIP

Upon enrolment, all applicants must sign up as **student members** of the Financial Planning Association of Singapore (FPAS). Membership fees are at \$80 (inclusive of 7% GST) per annum and are **NOT** included in the course fee. Please refer to *FPAS Procedures* accordingly. (subject to changes by FPAS)

12. EXAMINATIONS & FEES PAYABLE

Students will be required to register for examinations **at least six weeks** prior to the proposed examination date.

Examinations will be conducted three times annually in Mar/Apr, July & Oct/Nov. (subject to changes by FPAS)

Students who fail an examination will be allowed to repeat the examination at the next scheduled examination date, subject to FPAS rules & regulations.

The examination fees required for the FPAS administered examinations **are not covered** in the cost of the CFP[®], AWP^{cm} or AFP^{cm} Certification Programs, and must be paid separately. Individuals who plan to take the examinations should contact FPAS directly to obtain test dates, sites & registration information at Tel: 6372 1030 or email to: fpas@fpas.org.sg

All criteria related to the FPAS administered examinations are subject to the decision of the Examination Board of FPAS. Students requesting further details should contact FPAS.

13. EXEMPTIONS

Exemption from the CFP[®] Certification Program may be granted if students possess certain educational qualifications and/or practical experience. A **list of these criteria** is found in the FPAS Procedures. Applications for exemption could be made through FP upon enrolment and is subject to final approval from FPAS.

14. CERTIFICATION

Upon successful completion of all course requirements and the relevant FPAS examinations as well as fulfilling all other FPAS obligations (education, experience and ethics), students will be granted the rights to the marks CFP[®] and CERTIFIED FINANCIAL PLANNER[™] or AFP^{cm} and Associate Financial Planner^{cm}. Students should be aware that FPAS certification requirements are subject to changes and that the current requirements could be obtained by contacting **FPAS** at Tel: **6372 1030**.



Financial Perspectives

Financial Perspectives Pte Ltd

38B Circular Rd, FP House, Singapore 049394

T: (65) 6533 6121 F: (65) 6533 6802 E: cfpprograms@fp-edu.com URL: www.fp-edu.com

Your Preferred CFP[®] Education Provider