



Seidman Financial Planning Certificate Program

Finance Department
L. William Seidman Center
50 Front Ave, SW
Grand Rapids, MI 49504

Gregg Dimkoff, Director
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FINANCIAL PLANNING REGISTRATION FORM

(First time students must fill out page 2)

PLEASE PRINT YOUR NAME EXACTLY AS IT APPEARS ON YOUR LICENSE

NAME

PREFERRED MAILING ADDRESS: HOME WORK

ADDRESS

CITY, STATE, ZIP CODE

COMPANY NAME

DAYTIME PHONE FAX#

E-MAIL

CHECK ONE: First class in this program Last class in this program Other

Please fill out registration form completely and mail or fax to Jo Ann Shelton at the above address. DO NOT give registration form or payment to instructors.

Please indicate the courses for which you wish to register by checking the appropriate boxes:

	DESCRIPTION	TUITION / FEE	
<input type="checkbox"/>	FPC 301, Insurance Planning	\$675	
<input type="checkbox"/>	FPC 302, Investment Planning	\$675	
<input type="checkbox"/>	FPC 303, Personal Income Tax Planning	\$675	
<input type="checkbox"/>	FPC 304, Retirement Planning & Employee Benefits	\$675	
<input type="checkbox"/>	FPC 305, Estate Planning	\$675	
<input type="checkbox"/>	FPC 306, Capstone Course and Review	\$900	
<input type="checkbox"/>	Review Course Only	\$500	
	Late Fee - (A \$50 late fee, per course, will be charged for payments received after 3:00 p.m. on due date.)	\$50	
Payment due date is: by 3:00 p.m. 2 Fridays before the first day of that class		TOTAL AMOUNT DUE	

Payment Method: (See payment due date and "Late Fee" above)

Please invoice me for following amount \$ _____ (Please do not choose this option if you are including full payment with a credit card)

Check enclosed (Make payable to GVSU) – Check Amount \$ _____ Check # _____

Credit card (please check one) VISA MASTER CARD DISCOVER CARD AMERICAN EXPRESS

Amount to be charged to credit card \$ _____

Card No. Do not write this down – please call me with the # or register online

Exp. Date _____

Print Name _____

Signature _____

FOR OFFICE USE ONLY		
<input type="checkbox"/> REG	<input type="checkbox"/> CE	<input type="checkbox"/> CONF
<input type="checkbox"/> DEP	<input type="checkbox"/> INV	<input type="checkbox"/> RCPT

NOTE: Minimum class size is eight (8) students. If at least eight students have not registered by the registration deadline (see above) at 5:00 p.m., the class may be cancelled. For additional information contact Jo Ann Shelton at (616) 331-7427.

NAME _____

THIS PAGE NEEDS TO BE FILLED OUT BY STUDENTS ENROLLING IN THE PROGRAM THE FIRST TIME ONLY.

Will you have completed a bachelor's degree at an <u>accredited</u> college or university by the time you complete this program?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If "Yes" please indicate name of institution. _____ If "No" please see NOTE below and place initials on blank at end of this line to indicate you have read the note and are aware that a bachelor's degree is required for CFP® certification. _____		
Are you a graduate of Grand Valley State University?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If "Yes" please indicate major(s): _____		
Are you an employee of Grand Valley State University?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If "Yes" please indicate what position: _____		
Have you recently completed college courses that might be substituted for one or two FPC courses?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If "Yes" please submit transcript or syllabus for analysis.		
Do you have any experience in the field of finance?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If "Yes" please indicate approximately how many years: _____		
Why do you wish to enroll in the Financial Planning program? (check as many as apply)		
<input type="checkbox"/> I intend to complete the program and take the CFP® Certification Examination.		
<input type="checkbox"/> I intend to take only the courses I need to fulfill continuing education requirements.		
<input type="checkbox"/> I am interested in exploring the finance field for a career change.		
<input type="checkbox"/> Other – please explain: _____		
How did you hear about our program? (check as many as apply)		
<input type="checkbox"/> GVSU Website	<input type="checkbox"/> CFP Board Website	
<input type="checkbox"/> Grand Rapids Press	<input type="checkbox"/> State of Michigan OFIS Website	
<input type="checkbox"/> Grand Rapids Business Journal	<input type="checkbox"/> Someone who is or has been in the program	
<input type="checkbox"/> MiBiz West	<input type="checkbox"/> Someone at my place of employment	
<input type="checkbox"/> Brochure	<input type="checkbox"/> Other – please explain: _____	

NOTE: Beginning in January 2007, in addition to fulfilling the education requirement, a bachelor's degree will be required in order to attain CFP® certification. Individuals without a bachelor's degree will be allowed to sit for the CFP® Certification Examination, but they will have to attain a bachelor's degree before they can achieve CFP® certification.

Please feel free to contact us if you have any questions. Contact information is on the front page.

FOR OFFICE USE ONLY		
<input type="checkbox"/> CREATE RECORD	<input type="checkbox"/> DEGREE	<input type="checkbox"/> NON-DEGREE REVIEW
<input type="checkbox"/> ACCEPTED	<input type="checkbox"/> TRANSFER CREDITS REVIEW	<input type="checkbox"/> TRANSFER CREDITS ACCEPTED