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# **ChFEBC<sup>SM</sup> Webinar Course Enrollment Form**

*Please fill out and return to our office*

**Dates:** \_\_\_\_\_

Name \_\_\_\_\_

Company \_\_\_\_\_

Broker Dealer \_\_\_\_\_

IMO/FMO \_\_\_\_\_

Shipping Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email address: \_\_\_\_\_

<input type="checkbox"/> \$2,013.00 Total Cost Breakdown*
<b>*Materials Cost \$1998.00 + *Shipping Cost \$15.00</b>

The ChFEBC<sup>SM</sup> Designation is not affiliated with any financial entity nor does it endorse any financial products.

**Proctoring for your exam is scheduled by you as nobody knows your schedule as well as you do! To test you will locate the closest Huntington or Sylvan center near you and schedule your 2-hour proctored exam. (These facilities are independently owned and operated so we highly suggest you call both to obtain the difference in proctoring prices. You might also contact your local community college or library to see if they offer proctoring services. Please note, we do not cover the cost of the proctored exam or retest). Once you provide us with date and time scheduled and contact details, we will then send over the test link and proctor sheet.**

**Recertification occurs on an annual basis and notices go out fourth quarter of each year with a recertification deadline of December 31<sup>st</sup>, the cost is \$205.00.**

Due to the unique and proprietary nature of the materials no refunds will be given after the receipt of this shipment.



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**ChFEBC<sup>SM</sup> Requirements**

Candidates Name: \_\_\_\_\_ Date: \_\_\_\_\_

Birthday: \_\_\_\_\_

A new applicant for the ChFEBC<sup>SM</sup> must meet the following criteria:

- 3 Years of Financial Service Experience Year Started \_\_\_\_\_
- State Insurance License License # \_\_\_\_\_
- National Producer Number NPN# \_\_\_\_\_

AND ONE of the following:

- Series 6 CRD # \_\_\_\_\_
- Series 7 CRD # \_\_\_\_\_
- Series 24 CRD # \_\_\_\_\_
- Series 65 or 66 CRD # \_\_\_\_\_

Or be a Registered Investment Advisor

**If an applicant does not meet the criteria above, there is an alternative way to qualify.**

In addition to 3 years of financial services experience, candidate must hold one of the following:

- Chartered Financial Consultants® License # \_\_\_\_\_
- Chartered Life Underwriter® License # \_\_\_\_\_
- CERTIFIED FINANCIAL PLANNER® License # \_\_\_\_\_
- Chartered Financial Analyst® License # \_\_\_\_\_
- Masters in Business or Economics Graduation Date \_\_\_\_\_
- CPA License # \_\_\_\_\_
- Attorney's License License # \_\_\_\_\_
- Accredited Investment Fiduciary® License # \_\_\_\_\_