Rattiner's Financial Planning Review Course
for the CFP® Certification Examination
2023/2024 Enrollment Contract

Student Information:

Name: □ Mr. □ Mrs. □ Ms.

_____

Company:

_____

Shipping Address: □ Business □ Residential

Address:_____

City:_____

State:_____   Zip Code_____

Contact Numbers:
Work:_____
Cell: _____

Email Information:

_____
Years of financial planning experience? _____
Other

Tuition & Payment Information:

CFP® Review Class Type   □ **Virtual**   □ **Live**

CFP® Exam Date_____

Tuition (includes non-refundable $250 administration fee):

$1,395 – Virtual *or* Live Classes. ***Contact us*** *for class dates and locations. Discount Code_____ for 15% discount*

Pay by Credit Card: Visa __ M/C __ AmEx __ Discover ___

Credit Card Number:

_____
Security Code: _____ Exp. Date: _____
Name on Card, if different: _____
Address, if different: ___

Fax or **Email** your completed **Enrollment Form** to:
(**720) 221-0448 or jeff@jrfinancialgroup.com**

CFP® Education: _____
Undergraduate College:_____
Designations/Licenses/Certifications: □ CFA □ CLU □ ChFC □ JD □CPA □OTHER (list)

Referral Information/Individual/Source:_____

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