

# 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 college/university and sent to directly to [Assessments@TheInstitutes.org](mailto: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 for each individual waiver.

**Send To:**

The Institutes  
Attn: Assessments  
720 Providence Road, Suite 100  
Malvern, PA 19355-3433  
(610) 644-2100, ext. 7313 or fax (610) 725-5966

**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.

Applicant's Full Name: \_\_\_\_\_  
(Last) (First) (MI)

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

Student 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*

Charge my:  
 MasterCard  Visa  American Express  Discover  Diners Club  Electronic Funds Transfer

Account Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ CVV/CVC Number: \_\_\_\_\_

Cardholder Signature: \_\_\_\_\_ Billing Zip code: \_\_\_\_\_

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 Students who have already used their ACAS or FCAS to waive CPCU 540 are not eligible for this elective waiver	CPCU Electives Requirement Only	<input type="checkbox"/>
CA1 and CA2 <i>Must have credit for both courses to earn the waivers</i>	The Institutes Online CA1 and CA2 Examinations— See <a href="http://www.TheInstitutes.org/cas.htm">http://www.TheInstitutes.org/cas.htm</a> CA1—Risk Management and Insurance Operations CA2—Insurance Accounting, Coverage Analysis, Insurance Law, and Insurance Regulation	CPCU 500 and CPCU 520 <i>(The fee for the two CPCU waivers is \$350.)</i>	<input type="checkbox"/>
CFA	Chartered Financial Analyst	CPCU Electives Requirement	<input type="checkbox"/>
CIC	Certified Insurance Counselor	AAI 81	<input type="checkbox"/>
CLU, ChFC, CEBS, CFP	Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Employee Benefit Specialist (CEBS), Certified Financial Planner	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	Any 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 <i>Only one course may be waived for a single master's degree.</i>	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	CPCU 540	<input type="checkbox"/>
Master's in Financial Services	• Northwest Commission on Colleges and Universities • Southern Association of Colleges and Schools • Western Association of Schools and Colleges	CPCU 556	<input type="checkbox"/>
Master's in Risk Management and Insurance	• Non-U.S. Degrees: Contact World Education Services for a course-by course degree evaluation: <a href="https://www.wes.org/evaluations-and-fees/education/graduate-admissions/">https://www.wes.org/evaluations-and-fees/education/graduate-admissions/</a>	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"/>

