

REQUEST FOR ACADEMIC EQUIVALENCY

Mr or Mrs Name First name

Occupation

Current employer or company name

Business address

City Postal code

Telephone Fax

Email

Home address

City Postal code

Telephone Fax

Email

Address of correspondence: () Office () Home
Language of correspondence: () French () English
Method of payment: () Cheque () Visa () MasterCard

Card number: _____ Expiry date: _____

Signature _____ Date _____

REQUIRED DOCUMENTATION:

For all categories

- Duly completed Request for Academic Equivalency application form
- Certified copy of university diplomas or final transcripts
- Cheque to cover application fee

Plus:

Category II

- Proof of membership in one of the professional orders named in the IQPF Regulations

Category III

- Proof of membership in the Ordre des administrateurs agréés (if applicable)
- Curriculum vitae
- Two sworn letters (affidavits) signed by 2 superiors attesting to your experience. These letters must:
 - ✓ specifically mention that you have 2 years experience in at least one of the seven personal financial planning areas in the last 5 years
 - ✓ describe the duties you have performed in these areas

Category IV

- Proof of chartered life underwriter, securities fellow, Canadian Investment Manager, Financial Risk Manager, Certified Financial Planner, Chartered Financial Analyst, Conseiller en investissements financiers (CIF in France), Associate of the society of actuaries or Fellow of the society of actuaries title as required by IQPF Regulations
- Curriculum vitae
- Two sworn letters (affidavits) signed by 2 superiors attesting to your experience. These letter must:
 - ✓ specifically mention that you have 2 years experience in at least one of the seven personal financial planning areas in the last 5 years
 - ✓ describe the duties you have performed in these areas

Choose a category:

Category I () *(Graduate diploma, concentration in financial planning)*

Category II

- () Barreau du Québec
- () Chambre des notaires du Québec
- () Ordre des comptables généraux licenciés du Québec
- () Ordre des comptables en management accrédités du Québec
- () Ordre des comptables agréés du Québec

Category III

- () Graduate or undergraduate university degree in administration, economics, law or actuarial sciences, or three certificates in one or more of these disciplines
- () Ordre des administrateurs agréés du Québec

Category IV*

- () Canadian Securities Institute
- () Chartered life underwriter
- () Canadian Investment Manager (CIM)
- () Financial Risk Manager
- () Certified Financial Planner
- () Chartered Financial Analyst
- () Conseiller en investissements financiers (CIF in France)
- () Associate of the society of actuaries
- () Fellow of the society of actuaries

* + two certificates in administration, economics, law or actuarial sciences each comprised of a minimum of 450 course hours at the university level

Application fee (non refundable):
\$225.75 (tax included)

GST No.: 128798345 QST No.: 1012743811TQ0001