Application form – Academic equivalency

Please complete in **block letters** and send your application form **by mail**.

◯ Feminine ◯ Masculine

Gender | Last name | First name

Occupation | Current employer or company name

Work address | City | Postal Code

Telephone | Fax | Email

Home address | City | Postal Code

Telephone | Cell | Personal email

Language for correspondence	
◯	French
◯	English

Address for correspondence	
◯	Home
◯	Work

Costs *Prices may change without notice.	*Fees*	*GST 128798345*	*QST 1012743811TQ0001*	*Total*
File analysis and setup **(non-refundable[illegible])**	$200.00	$10.00	$19.95	$229.95

Payment method: please call the accounting department (514-767-4040, ext. 227) to make your payment.

*Please note that the file analysis and setup fees will be $250.00 plus taxes starting April 1st, 2021.

Signature | Date

Please complete 2nd page.

Select a category:

CATEGORY I

◯Master's degree with a concentration in financial planning
◯Certified Financial Planner (CFP) title and bachelor's or master's degree in administration, economics, law or actuarial science or 3 certificates in these disciplines

CATÉGORY II

◯Lawyer
◯Notary
◯CPA

CATEGORY III

◯Bachelor's or master's degree in administration, economics, law or actuarial science or 3 certificates in these disciplines
◯Adm.A.

+ 2 years of experience within the last 5 years in at least one of the 7 personal financial planning areas

CATEGORY III B

◯Bachelor's or master's degree and personal financial planning certificate + 2 years of experience within the last 5 years in at least one of the 7 personal financial planning areas

CATEGORY IV

◯Chartered Life Underwriter (CLU)
◯Securities fellow
◯Canadian Investment Manager (CIM)
◯Financial Risk Manager (FRM)
◯Certified Financial Planner (CFP)
◯Chartered Financial Analyst (CFA)
◯Conseiller en investissements financiers (CIF in France)
◯Associate of the Society of Actuaries (ASA)
◯Fellow of the Society of Actuaries (FSA)

+ 2 certificates in administration, economics, law or actuarial science (each comprised of a minimum of 450 course-hours at the university level) and 2 years of experience within the last 5 years in at least one of the 7 personal financial planning areas

CATEGORY V

◯Bachelor's or master's degree or 3 certificates comprised of a minimum of 450 course-hours at the university level + 2 years of experience within the last 5 years in at least one of the 7 personal financial planning areas

◯Evidence of successful completion of the Université Laval's *Parcours intensif en gestion dans le contexte des entreprises de planification financière* program + 3 years of experience within the last 5 years in at least one of the 7 personal financial planning areas

Required documents:

For all categories:
- Duly completed application form
- Certified copy of university diplomas or final transcripts **(photocopies not accepted)**
- Payment to cover file analysis and setup fees

Plus:

Category II
- Proof of payment for professional order membership fees for the current year

Category III
- Proof of payment for *Ordre des administrateurs agréés du Québec* membership fees for the current year, if applicable
- Curriculum vitae
- Two sworn letters* (affidavits) attesting to your experience, each signed by a different superior

Category III B
- Curriculum vitae
- Two sworn letters* (affidavits) attesting to your experience, each signed by a different superior

Category IV
- Proof of title
- Curriculum vitae
- Two sworn letters* (affidavits) attesting to your experience, each signed by a different superior

Categorie V
- Curriculum vitae
- Two sworn letters* (affidavits) attesting to your experience, each signed by a different superior

*These letters must **(photocopies not accepted)**:
- specifically mention that you have 2 or 3 years' experience (depending on the selected category) in at least one of the 7 personal financial planning areas in the last 5 years
- describe the duties you have performed in these areas
- be signed by a Commissioner of Oaths and include their commissioner number

3 Place du Commerce, Suite 501, Île-des-Sœurs, Verdun (Québec) H3E 1H7 | **Phone:** 514-767-4040 | **Fax:** 514-767-2845 | iqpf.org