

**Application form – Academic equivalency**

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

<input type="checkbox"/> Feminine	<input type="checkbox"/> Masculine		
Gender	Last name	First name	

Occupation	Current employer or company name
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Work address	City	Postal Code
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Telephone	Fax	Email
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Home address	City	Postal Code
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Telephone	Cell	Personal email
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Language for correspondence	
<input type="checkbox"/>	French
<input type="checkbox"/>	English

Address for correspondence	
<input type="checkbox"/>	Home
<input type="checkbox"/>	Work

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

Payment method:  Cheque  Visa  MasterCard  American Express

Card number	Expiration date	3 or 4-digit security code
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Name on card
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Signature of cardholder	Date
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**Please complete 2<sup>nd</sup> 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

### CATÉGORIE 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 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
- be signed by a Commissioner of Oaths and include their commissioner number