

# 2008 ENROLMENT FORM

Are you currently a student of Kaplan ?  Yes  No

## PERSONAL PARTICULARS

Name (as in IC/Passport):			
Nationality: Singaporean / PR / Others:		NRIC/Passport No:	
Sex: Male / Female		Date of Birth:	
Address: <span style="float: right;">Spore</span>			
E-Mail (compulsory):			
Handphone:	Tel (O):	Tel (H):	Fax:

## EMPLOYMENT DETAILS

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Nature of Business: \_\_\_\_\_ Designation: \_\_\_\_\_ Years Employed: \_\_\_\_\_

Is your present employer a Charter or Corporate member of FPAS?  YES  NO (If YES, please submit original letter from employer)

## EDUCATIONAL DETAILS

Minimum entry requirement for the AFP<sup>CM</sup>, AWP<sup>CM</sup> and CFP<sup>CM</sup> Certification Education Programs is a full GCE 'A' Level Certificate (minimum 2 'A's and 2 'O's) or alternatively, at least 3 years working experience.

Highest Level of Education obtained (please attach a certified true copy of certificate/s):

GCE 'A' Levels (Min 2 'A's & 2 'O's)  Diploma  Degree  Professional  Others: -

Min. 3yrs working Exp (Letter from Company is required if you do not meet the minimum education requirement)

## COURSE APPLICATION AND COURSE FEES

CFP <sup>CM</sup> Education Program STUDY OPTIONS	Lecture System	Self Study	Accelerated Program
<b>Module 1:</b> Foundations in Financial Planning	\$700 <input type="checkbox"/>	\$500 <input type="checkbox"/>	\$500 <input type="checkbox"/>
<b>Module 2:</b> Risk Management & Insurance Planning	\$700 <input type="checkbox"/>	\$500 <input type="checkbox"/>	\$500 <input type="checkbox"/>
<b>Module 3:</b> Tax Planning & Estate Planning	\$700 <input type="checkbox"/>	\$500 <input type="checkbox"/>	\$500 <input type="checkbox"/>
<b>Module 4:</b> Investment Planning	\$700 <input type="checkbox"/>	\$500 <input type="checkbox"/>	\$500 <input type="checkbox"/>
<b>Module 5:</b> Retirement Planning	\$700 <input type="checkbox"/>	\$500 <input type="checkbox"/>	\$500 <input type="checkbox"/>
<b>Module 6:</b> Financial Plan Construction & Professional Responsibilities	\$700 <input type="checkbox"/>	\$500 <input type="checkbox"/> Lecture System <input type="checkbox"/>	\$500 <input type="checkbox"/>
<b>Total Amount payable for Modules 1 to 6</b>	<b>\$4,200</b> <input type="checkbox"/>	<b>\$3,000</b> <input type="checkbox"/>	<b>\$3,000</b> <input type="checkbox"/>
<b>Discounts applicable for each study option if enrolled in all 6 modules</b>	Pay only <b>\$4,000</b> provided that all 6 modules are completed within 3 exam sittings	Upgrade to Lecture System for Module 6 at no extra cost. Modules 1 to 5 remain self-study mode. All 6 modules to be completed within 4 exam sittings.	Not applicable
<b>Discounts applicable if enrolled in 2 or more modules</b>	<b>10% discount</b>	Not applicable	Not applicable
<b>Discounts applicable for enrolment in Modules 1, 4 &amp; 5 = AWP<sup>CM</sup> program</b>	Pay only <b>\$1,900</b> but all 3 modules must be completed in 2 exam sittings	Not applicable	Not applicable

- \* Please note that all prices exclude GST, FPAS membership and examination fees.
- \* Corporate discount is applicable for lecture system.
- \* SDF Grant is available for the CFP<sup>CM</sup> Program.
- \* Exam Preparation Class specially designed for students on self-study or who are retaking CFP<sup>CM</sup> exams are also available. It is priced at \$120 per module (excluding GST).

### PAYMENT MODE

- CASH      Nets      CHEQUE     Bank: \_\_\_\_\_ No. \_\_\_\_\_  
*(Cheque must be crossed and made payable to "KAPLAN FINANCIAL (S) PTE LTD" and mail to 51 Cuppage Road, #03-01 StarHub Centre, Singapore 229469)*  
 CREDIT CARD (Visa or Mastercard)     *To make payment by credit card, please visit our office at above address*

### GENERAL POLICIES, TERMS AND CONDITIONS

#### 1. Admission Requirements

The minimum entry requirements for the AFP<sup>CM</sup>, AWP<sup>CM</sup> and CFP<sup>CM</sup>. Certification Education Programs are a full GCE 'A' Level certificate (minimum 2 'A's and 2 'O's), or alternatively, minimum 3 years working experience. Applicants must also apply to be a FPAS member when enrolling in the programs.

#### 2. Course Fees

Course fees are payable upon registration. Course fees do not include FPAS membership fees and examination registration fees.

Charter/Corporate Member rates are only applicable to candidates who are contracted or employed by FPAS Charter/Corporate Member companies. These rates will continue to be applicable as long as the candidate is contracted or employed by FPAS Charter/Corporate Member companies. The application must be supported by an original letter from the company.

#### 3. Examinations

Registration for the AFP<sup>CM</sup>, AWP<sup>CM</sup> and CFP<sup>CM</sup>, examinations must be done directly with the Financial Planning Association of Singapore ('FPAS'). Kaplan Financial shall not be held liable in the event that candidates do not register their examinations with FPAS during the registration period.

#### 4. Vacancies for Lectures

Vacancies for the lecture classes are limited and are based on a first-come-first-served basis. However, these classes may be cancelled if there are an insufficient number of candidates.

#### 5. Postponement of Lectures

Notice of postponement must be made in writing. Postponement of lectures is allowed if notice is received at least 30 days from the commencement of lectures. However, candidates must take the current study guide which may need to be updated for a later examination.

#### 6. Change from Lecture System to Self-Study Method

Notice of change must be made in writing. If written notice of change is received at least 30 days from the commencement of lecture classes, lecture fees paid (excluding administration fee of \$80/- per module) will be refunded. Lecture fees refer to the difference between lecture and self-study course fees. There will be no refund if notice of change is received less than 30 days from the commencement of lectures.

#### 7. Change from Self-Study Method to Lecture System

Notice of change must be made in writing and will be subject to availability of vacancy for the lectures. Candidates will have to pay the difference between the prevailing fees for the lecture system and the fees paid for the self-study method.

#### 8. Withdrawal / Transfer

Notice of withdrawal must be made in writing. If written notice of withdrawal is received within 30 days of registration and before FPAS' official examination registration closing date, course fees paid (excluding cancellation fee of \$200/- per module) will be refunded. If candidates have received the study manuals and/or interactive CD, they must also return these items in their original unopened packaging within 30 days of registration in order to get a refund. There will be no refund if notice of cancellation is received after 30 days of registration. Transfer of course to another person is strictly not allowed.

#### 9. Study Manual Updates

Candidates will need the most current study manuals in order to prepare for the examinations. Therefore, if candidates defer for an examination or need to re-sit an examination, it is their responsibility to enquire about any updates to the study manuals. A fee is payable for any updates to the study manuals.

#### 10. SDF Grant

Special terms and conditions apply to SDF Grant applicants.

#### 11. Other Matters

Discounted course packages have to be completed within the stipulated exam sittings; otherwise the difference in course fees is payable.

#### 12. Changes

Kaplan Financial reserves the right to make any changes to the information specified herein or to the courses in general as and when it considers appropriate. Kaplan Financial's decision is final.

### DECLARATION

*I hereby declare that all the information provided above is true and I understand that Kaplan Financial can reject my application if there is any misrepresentation or omission of required information. I understand and agree to abide by the General Policies, Terms and Conditions of Kaplan Financial. I am also aware that the fees payable to Kaplan Financial excludes the FPAS membership fee and the examination fee, which must be paid separately to FPAS subject to FPAS' terms and conditions.*

\_\_\_\_\_  
Signature & Date

### CHECKLIST FOR CANDIDATE

1. ENROLMENT FORM duly completed and signed.
2. If employer is a Charter/Corporate member, attach ORIGINAL LETTER from employer verifying your employment.
3. Attach Certified True Copy of CERTIFICATE/S or ORIGINAL LETTER from employer stating Length of Employment if you do not meet the minimum education requirement.
4. Attach Certified True Copy of CERTIFICATE/S to support application for exemption.

The completed Enrolment Form, together with the necessary payment and supporting documents, should be sent to:

**KAPLAN FINANCIAL EDUCATION CENTRE**  
51 Cuppage Road #03-01 StarHub Centre Singapore 229469  
Tel: 67331877 Fax: 67332977 E-mail: admin@ftckaplan.com.sg

### MATERIAL COLLECTION

STUDY GUIDE     CD     OTHERS \_\_\_\_\_    Date : \_\_\_\_\_    Receipt No: \_\_\_\_\_  
 \_\_\_\_\_  
 Processed by: \_\_\_\_\_