

Chartered Financial Divorce Specialist

Professional Development Day Training Registration

Name: _____

Designation(s): CFP R.F.P. PFP CLU CPA or equivalent (contact us to verify)

The Academy requires proof of designation sent with this registration form. Registration will not be complete until proof has been provided.

Contact information:

Shipping method: Mail Courier (ICS – can only be used when shipping to business address)

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone No: _____ Fax No: _____

Email Address: _____

Member/Student: Current members and students wanting to attend the next upcoming PD Day

Other Financial Professionals: Professionals of the Financial industries wanting to attend the next upcoming PD Day

*Breakfast, lunch and coffee breaks are included during the training session please let us know of any **Food allergies/intolerances or other required needs for duration of session:** _____*

Continue on page 2

The Academy of Financial Divorce Specialists Policies:

By registering for training or renewing membership you are agreeing to be bound by the following policies. The Academy of Financial Divorce Specialist (hereafter known as the “AFDS”) reserves the right, including but not limited to the following:



Membership Policy

Membership renewals are due annually on October 1st. Memberships that have not been renewed by December 31st will cost \$250.00 (plus tax). Should the membership lapse for a period greater than two years; the member will be required to audit the course for retraining. A member can choose to submit all module exams and final case study by the ‘Self Study’ or ‘In Class’ method. If retraining is not completed, it will result in the member’s designation being withdrawn, removal from website, loss of software access, and cancellation of any other benefits provided by the AFDS.

Associate Membership Policy

Associate Membership renewals are due annually on October 1st. Memberships that have not been renewed by December 31st will cost \$210.00 (plus tax). Associate Members are not permitted to use the CFDS designation in any capacity and will not be given access to the Perspectives Software©.

Rescindment of Designation Policy

The AFDS may revoke the ‘CFDS’ designation should a member be found deficient and does not adhere to the Code of Professional Ethics and Professional Best Practice Standards. Failure to comply may result in expulsion and exclusion from the AFDS as outlined in the Code of Professional Ethics.

Contact Information & Communication Policy

The AFDS’ primary method of communication is email. Example of communication may include but are not limited to: membership notifications, update to software and other supportive tools & resources, course completion notifications, training opportunities, etc. All Students/Members/Associate members are responsible to notify the AFDS of any changes to contact information.

Software Policy

The Perspectives Software© is licensed by the AFDS. It is not for sale or distribution and is only to be used by those who are actively enrolled in the ‘CFDS’ course, or those who have successfully completed the course and remain in good standing with the AFDS

Audit Policy

The AFDS may audit its students and members for proof of designation, completion of required continuous educational credits, and/or proof of Errors and Omissions Insurance at any time. Failure to provide required proof of documentation can result in termination of membership or abrogation of the Chartered Financial Divorce Specialist (CFDS) designation.

Enrollment Policy

The AFDS may refuse enrolment of a student based on misleading or falsification of information. Students are to complete the course within one year of enrolment. In the event the student fails to finish the course within the allotted timeframe, it is the student’s responsibility to contact the AFDS and set up an extension to the course prior to the course enrollment expiring. The administration fee for an extension is \$395.00 (plus tax) and an additional shipping fee will be charged if extra material is required. The AFDS may change the administration fee at any time and without notice. Students who fail to complete the course in the extended period of time, or fail to notify the AFDS of course extension being required, will have to purchase the course again and retake any previous exams.

Cancellation Policy

Should the AFDS cancel the Professional Development Day or In Class training session, attendees have the option of either a rain check for next event, reimbursement for the In-Class cost of the course or full reimbursement of the course upon returning all course related materials to the AFDS.

Professional Development Day, In Class training:

Cancellations are subject to an administration fee of \$50.00 (plus tax).

Cancellation 30 days or less prior to the event - Students or Members no longer qualify for a refund.

Self Study Training (Internet or Internet with Hard Copy) is non-refundable.

Exam Policy (Module One, Module Two & Final Exam)

-Module One or Two

If a student is not successful in achieving a passing grade, the exam fee is \$125 (plus tax) per rewrite.

-Final Exam

After completion of Modules One to Four, students are responsible to email the AFDS to request the final exam. The exam must be completed and submitted within 30 days of receipt. Submission of the exam includes: digital copy of the case file and a professional hard copy of the report for the client. If after 30 days the student has not completed the final case study exam, the cost for a 30 day extension is \$50.00 plus applicable taxes. Amendments to the final exam must be completed within 30 days of the phone appointment review. If after 30 days you have not sent in a digital copy of your amendments, the cost for a 30 day extension is \$50.00 plus applicable taxes. Failure to complete the final exam or amendments within the allotted 30 days will result in having to re-register for the course, pay the course fee, rewrite all the exams and rewrite the final case study.

-In Class Students

Module One and Two Exams (4 total) must be completed online prior to attending the In Class session. Failure to complete may result in an incomplete and the final exam will not be corrected. Amendments to the final exam must be completed within 30 days of the phone appointment review. If after 30 days you have not sent in a digital copy of your amendments, the cost for a 30 day extension is \$50.00 plus applicable taxes. Failure to complete the final exam or amendments within the allotted 30 days will result in having to re-register for the course, pay the course fee, rewrite all the exams and rewrite the final case study.

I have read and understand the Academy of Financial Divorce Specialist policies.

Signature/Type Name: _____ Date: _____