Course Indication Form

Please indicate below the course(s) for which you are requesting an exemption(s). Each form must include the following:

* A legible and complete current copy of transcript(s) of marks indicating successful completion of the course(s) taken.
* Course content and evaluation details on each course for assessment purposes (e.g. table of content or course syllabus).

Sample:

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| **Indicate the CSI course to be exempted from** | **Indicate the courses for which you are requesting equivalency** | | | |
| Financial Planning I | **Institution** | **Course #** | **Course Title** | **Completion date** |
| R University | 1236 | Personal Financial Planning | Jan 2020 |
| 4060 | Risk Management and Insurance | April 2021 |
| 5068 | Retirement and Estate Planning | Dec 2021 |

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| **Indicate the CSI course to be exempted from** | **Indicate the courses for which you are requesting equivalency** | | | |
|  | **Institution** | **Course #** | **Course Title** | **Completion date** |
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| **Indicate the CSI course to be exempted from** | **Indicate the courses for which you are requesting equivalency** | | | |
|  | **Institution** | **Course #** | **Course Title** | **Completion date** |
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