Course Indication Form

Please indicate below the course(s) for which you are requesting an exemption(s).

Each form must include the following:

* An Official transcript
* A copy of the table of content or course syllabus is required for all courses that are requested for evaluation.

Sample:

|  |  |
| --- | --- |
| **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 |

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

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

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

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