Course Indication Form

To qualify for an exemption, the content of the external course you completed must match the curriculum of the corresponding CSI course. To verify that they match:

1. Visit the CSI website at www.csi.ca
2. Navigate to the course you wish to be exempted from.
3. Open the Curriculum section on the course page.
4. Review the full syllabus to compare its content with that of your completed course.

Exemption requests are evaluated based on the curriculum alignment. If the content of the course you completed does not sufficiently match that of the CSI course, your request will be declined with no refund.

To qualify for the exemption, you must also provide the following documents:

* An official transcript.
* A copy of the full course syllabus for all courses requested for evaluation.
* A minimum passing grade of 60% (i.e., any midterm and final exams completed must total 60% of your course grade).

In cases where the course syllabus does not provide enough detail for an accurate assessment, a table of contents may also be requested.

Note that only courses completed within the past seven (7) years will qualify for an exemption, and only one course will be considered per course exemption.

**Example**

Below are two examples of exemption requests for [Financial Planning I](https://www.csi.ca/en/learning/courses/fp1/curriculum). Open the hyperlink to see the syllabus for comparison.

The first request would be accepted because the courses align closely with the FPI syllabus, and they were completed within the past seven years. The second would be declined because the courses do not align, and the completion dates exceed seven years.

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| **Request Accepted** | | | | |
| **Indicate the CSI course to be exempted from** | **Pease list the courses you have completed that you believe qualify you for an exemption from a CSI course.** | | | |
| Financial Planning I | **Institution** | **Course #** | **Course Title** | **Completion date** |
| University ABC | 1236 | Personal Financial Planning | 3 years ago |
| 4060 | Risk Management and Insurance | 5 years ago |
| 5068 | Retirement and Estate Planning | 7 years ago |

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| **Request Declined** | | | | |
| **Indicate the CSI course to be exempted from** | **Pease list the courses you have completed that you believe qualify you for an exemption from a CSI course.** | | | |
| Financial Planning I | **Institution** | **Course #** | **Course Title** | **Completion date** |
| University YXZ | 4756 | Corporate Finance | 15 years ago |
| 7896 | Accounting | 10 years ago |
| 8563 | Macro Economics | Last year |

List the course or courses for which you seek an exemption in the form below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Indicate the CSI course to be exempted from** | **Pease list the courses you have completed that you believe qualify you for an exemption from a CSI course.** | | | |
|  | **Institution** | **Course #** | **Course Title** | **Completion date** |
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