

The Institutes' Waiver Request Form

For approval, please submit:

- This application form (*both sides completed*) to:
The Institutes
Attn: Sandy Bowman
720 Providence Road, Suite 100
Malvern, PA 19355-3433
- An official transcript for an advanced or graduate degree from the college/university or an original designation letter on the awarding organization's letterhead. *The only acceptable form of electronic transcripts are from an official electronic transcript service through the college/university. No photocopies, facsimiles, screen shots, or forwarded e-mails will be accepted.*
This electronic transcript must be sent from the college or university and sent directly to **Assessments@TheInstitutes.org**.
- Payment of the \$150 application processing fee for each individual waiver granted (U.S. dollars).
* No payment is required for the AIAF 119 credit via LOMA coursework. AIAF 119 can be used with AIAF 112 to obtain the AIAF designation.
- *Note:* Because of the dynamic nature of The Institutes courses and programs, waivers granted are subject to continuous review and may change without notice at any time.

Please allow two weeks for processing.

Applicant's Full Name: _____
(Last) (First) (MI)

Applicant ID Number: _____

Employer: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Home Address Business Address

Daytime Telephone: _____

E-Mail Address: _____

Enclosed is my check or money order, made payable to **The Institutes**.

Charge my Company Account Number: _____
Company Name: _____

Charge my:
 MasterCard Visa American Express Discover Diners Club Electronic Funds Transfer

Account Number: _____

Exp. Date: _____

Cardholder Signature: _____

The Institutes accept the following to earn exam credit for our programs:

Professional Designations or Advanced or Graduate College Degrees*	Description	Exam Credit Earned in Institutes Program	Requested Waiver
ACAS or FCAS	Associate (or Fellow), Casualty Actuarial Society	CPCU Elective Requirement Only Students who have already used their ACAS or FCAS to waive CPCU 540 are not eligible for this elective waiver	<input type="checkbox"/>
AIIIC or CIP	Associate Member of the Insurance Institute of Canada or Chartered Insurance Professional	CPCU 500, 530, and CPCU Elective Requirement	<input type="checkbox"/>
CAS1 and CAS2 <i>Must have credit for both courses to earn the waiver</i>	CAS1 – Risk Management and Insurance Operations CAS2 – Insurance Accounting, Coverage Analysis, Insurance Law, and Insurance Regulation	CPCU 500 and CPCU 520	<input type="checkbox"/>
CFA	Chartered Financial Analyst	CPCU Elective Requirement	<input type="checkbox"/>
Chartered Insurance Institute	Both CII P05 Insurance Law and 530 Business and Economics	CPCU 530	<input type="checkbox"/>
	CII 940 Finance and Accounting	CPCU 540	<input type="checkbox"/>
CIC	Certified Insurance Counselor	AAI 81	<input type="checkbox"/>
CLU, ChFC, CEBS	Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Employee Benefit Specialist (CEBS)	CPCU 556	<input type="checkbox"/>
CPA	Certified Public Accountant	CPCU Elective Requirement	<input type="checkbox"/>
FLMI	Fellow, Life Management Institute	CPCU Elective Requirement	<input type="checkbox"/>
Law Degree	Any graduate of a law school approved by the American Bar Association or any person admitted to a state bar	CPCU 530	<input type="checkbox"/>
LOMA	LOMA 290, 356, 371 and AIAF 400	*AIAF 119	<input type="checkbox"/>
Master's in Business Administration (MBA) OR Master's in Finance	Applicable advanced or master's degrees in business, finance, economics, risk management, and insurance only (no undergraduate or MA degrees) must be from: <ul style="list-style-type: none"> • Middle States Association of College and Schools, Commission on Higher Education 	CPCU 540	<input type="checkbox"/>
Master's in Financial Services	<ul style="list-style-type: none"> • New England Association of Schools and Colleges • North Central Association of Colleges and Schools • Northwest Association of Schools and Colleges • Southern Association of Colleges and Schools 	CPCU 556	<input type="checkbox"/>
Master's in Risk Management and Insurance	<ul style="list-style-type: none"> • Western Association of Schools and Colleges • Non-U.S. Degrees: Contact World Education Services for Degree Evaluation http://www.wes.org/students/index.asp 	CPCU 500	<input type="checkbox"/>
Non-Life Fellow	Insurance Institute of India – the candidate must have passed all exams with Distinction to earn the waiver	CPCU Elective Requirement	<input type="checkbox"/>
RPLU	Registered Professional Liability Underwriter	CPCU Elective Requirement	<input type="checkbox"/>
RPLU - ASLI Electives		ASLI Electives <i>(The fee for the two ASLI electives is \$300)</i>	<input type="checkbox"/>