

CPE Credit Application Form

Complete this form and email the document to SSCLI_Support@sscinc.com

Note that this is **only applicable** if you require a certificate for Continuing Education credits (CEs) and Continuing Professional Education credits (CPEs) with the bodies listed in the CPE Credit Listing document.

We will process your application and return a copy of your certificate in 1-3 business days.

Applicant Information

Name:	Company:
Address:	Email:

Professional Status (please select the designation(s) you are applying for)

<input type="radio"/> AIF®, AIFA®, PPC®	Fi360® Email:		
<input type="radio"/> C(k)P®	Phone #:		
<input type="radio"/> CFP®	CFP® Board ID #:		
<input type="radio"/> CIMA®, CIMC®, CPWA®, RMA®	Institute ID #: Zip Code:		
<input type="radio"/> CPA®	State where licensed:		
<input type="radio"/> IAR	IAR CRD #:		
<input type="radio"/> AAMS®, CRPC®, CRPS®	<input type="radio"/> ACCA®	<input type="radio"/> AFIM®, CFIRS®, CRRP®, CWS®	<input type="radio"/> CFA®
<input type="radio"/> CFS®	<input type="radio"/> CIDA®	<input type="radio"/> CLU®, ChFC®, FSCP®, WMCP®	<input type="radio"/> CFS®
<input type="radio"/> CPCU®	<input type="radio"/> CPM®		

Courses Completed (please list below)

I certify that I personally completed the courses for which credit is requested.

Name _____ Date _____



Evaluation

Please indicate your level of agreement by marking the appropriate box.

	Agree	5	4	3	2	1	Disagree
The stated learning objectives of the course were met.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The stated prerequisite requirements were appropriate and sufficient.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
The course material, including the qualified assessment, was relevant and contributed to the achievement of the learning objectives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Time allotted to the course was appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
I would recommend this product to a colleague.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Overall, how would you rate your experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Which topic areas below are of interest to you?

- | | |
|---|---|
| <input type="radio"/> Asset Management | <input type="radio"/> Personal Finance |
| <input type="radio"/> Financial Planning | <input type="radio"/> Private Equity |
| <input type="radio"/> Financial Technology | <input type="radio"/> Programming Languages |
| <input type="radio"/> Insurance | <input type="radio"/> Retirement Planning |
| <input type="radio"/> Negotiation and Soft Skills | <input type="radio"/> Software Skills |

Other _____