



Professional Designation Programs Refund Policy

Purpose

To provide guidance both internally and externally regarding the management of tuition refunds within the College for Financial Planning - a Kaplan Company's Professional Designation Programs.

Definitions

Cancellation with refund

A cancellation from a Professional Designation Program is a student-initiated request made in writing to cease enrollment within a specified number of days from the initial date of enrollment.

Voluntary Withdrawal with no refund

A voluntary withdrawal from a Professional Designation Program is a student-initiated request made in writing to cease enrollment after the cancellation period, but prior to the last day of course access (deadline). *Students will not be withdrawn from a course after a final grade has been issued.*

Requesting a Refund

Students must complete and sign the [Cancellation/Withdrawal Request Form](#) and return via email or fax as directed at the bottom of the document. The cancellation/withdrawal request will automatically initiate a refund review based on the following criteria:

Professional Designation Program		Request	Tuition Refund	Deadlines
AAMS® APMA® AWMA® CMFC®	CRPC® CRPS® CSRIC™ FPQP™	Cancel	100%	Cancellation Period: 0-30 days from first date of enrollment
		Withdraw	No refund	Withdrawal Period: 31-365 days from initial date of enrollment
LUTCF® Education Program		Cancel	100%	Cancellation Period: 0-30 days from first date of enrollment
		Withdraw	No refund	Withdrawal Period: 31-365 days from first date of enrollment
LUTCF® Single Course		Cancel	100%	Cancellation Period: 0-30 days from first date of enrollment
		Withdraw	No refund	Withdrawal Period: 31-365 days from first date of enrollment
WMS™		Cancel	100%	Cancellation Period: 0-14 days from first date of course access
		Withdraw	No refund	Withdrawal Period: 15-365 days from initial date of enrollment

Refunds after Attempted Exam

Once a required exam is attempted, requests to cancel or withdrawal are no longer permitted and the course tuition is nonrefundable, regardless of when a request is submitted. The final grade earned for the course will be posted to the student's record.

Program and/or Course Fees

Any fees associated with the Professional Designation Programs are non-refundable.

Shipping and Handling of Course Materials

Shipping and handling fees are non-refundable.



Program and/or Course Status

Cancellation with refund

If a *Cancellation/Withdrawal Request Form* is received within the cancellation period associated with the student's Professional Designation Program, the enrollment status of "-Cancelled" will be assigned to the course that was in "-Active-" status immediately preceding the student's request. Final grades are not assigned to "-Cancelled-" courses, nor will the course be included on student transcripts.

Voluntary Withdrawal with no refund

If/when a *Cancellation/Withdrawal Request Form* is

- (a) received after the cancellation period but prior to the last day of course access, and
- (b) the course final exam has not been attempted, then

the enrollment status of "-Withdrawn-" and a final grade of "-W-" will be assigned to the course that was in "-Active-" status immediately preceding a student's request.

The effective date for all cancellation and/or voluntary withdrawal requests will be recorded as the date the completed and signed form was received by the College.

Final Course Grade(s) and Transcripts

Cancellation

Cancelled courses/programs will not be recorded on transcripts.

Voluntary Withdrawal

A voluntary withdrawal will be included on official transcripts along with a final course grade posted as "-W-" (indicating the withdrawal).

Reenrollment

Students who voluntarily withdraw from a Professional Designation Program are eligible to re-enroll at a later date.