



International Foundation for Retirement Education

CERTIFIED RETIREMENT COUNSELOR® (CRC®) CERTIFICATION - REGISTRATION FORM

There is no charge to register for the CRC® program. After completing this registration form, you will receive an email confirmation with information about the CRC® certification requirements and CRC® exam. We will also keep you informed about other important information via InFRE NewsBriefs.

Applicant Information

Name _____ Mr. _____ Mrs. _____ Ms. _____

Company/Organization _____

Home Address _____ City _____ State _____ Zip _____

Work Address _____ City _____ State _____ Zip _____

Daytime Phone _____ Home Phone _____ Fax _____

Email Address _____ Mailing preference Home _____ Work _____

Business/Profession

What is your primary business/occupation? _____

What is your primary title/position/ area of responsibility? _____

If applicable, what is your broker/dealer affiliation? _____

How long have you been employed in the financial service/retirement industry? _____

Education (Please circle highest level of education completed)

High School Two-year College Four-year College Masters PhD

Current Designations and Licenses (Please circle all that apply and add designations and licenses not listed)

CFP® CEBS CFA CLU EA ChFC SR.7 SR.6 SR.63 SR.65 PFS RFG CASL CSA Other _____

Association Memberships (Check all that apply)

ABA AFS AIMR AICPA BISA FPA IFEBP LIMRA NAGDCA NAIFA NCPERS NCTR

NAPFA NASRA NPEA PSCA SOA Other _____

Exam Preparation

The comprehensive CRC® exam contains 200 questions that will test your knowledge and understanding of competencies and tasks relevant to the retirement counseling profession. An outline of these competencies and tasks can be found on InFRE’s website and will also be forwarded to you after completing this registration form. You may prepare for the exam by using your own study materials and other available resources. InFRE also offers educational resources to help CRC® candidates prepare for the exam. If you would like more information about InFRE study materials, please check the appropriate box below.

Yes, please provide information about CRC® exam preparation resources offered by InFRE.

No, do not send me information about CRC® exam preparation resources offered by InFRE.

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Disclosures (Please circle Yes or No)

Have you ever been a defendant in a criminal proceeding? (You are not required to disclose juvenile offenses, traffic, or similar nuisance offenses).

Yes

No

Have you ever been subject to a regulatory, licensing or inquiry/investigation proceeding conducted by a state or federal agency, or civil/professional organization with respect to your professional or business activities?

Yes

No

If you answered yes to either of the questions above, please provide relevant facts and outcomes of any such proceedings in the space provided.

Statement of Confidentiality

Individuals applying to become a Certified Retirement Counselor® (CRC®) candidate are required to adhere to InFRE’s CRC® Comprehensive Examination confidentiality policy. As such, when submitting this application you are agreeing to uphold the confidential nature and content of the CRC® Comprehensive Examination and further agree that you will not jeopardize the integrity of the CRC® examination process by revealing content in the CRC® Comprehensive Examination to any others. CRC® candidates or certificants found to be in violation of this agreement will be subject to immediate revocation of their CRC® candidate or certificant status.