



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 a confirmation email with information about preparing for the CRC® examination. Fax your completed form to 847.756.7350 or mail the form to InFRE, PO Box 524, Barrington, IL 60011.

### 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

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.

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## Statement of Confidentiality

Individuals applying to become Certified Retirement Counselor® (CRC®) candidate are required to adhere to InFRE's CRC® Comprehensive Examination confidentiality policy. As such, when submitting this registration form 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.