



AGREEMENT FOR TRANSFER OF CREDITS BETWEEN THE AMERICAN COLLEGE AND WAUKESHA COUNTY TECHNICAL COLLEGE, PEWAUKEE, WI

Waukesha County Technical College (WCTC) will provide transfer credit for students who successfully complete courses and/or programs from The American College’s Huebner School. The American College will reciprocate transfer of appropriate courses provided by WCTC with a grade of “C” or better. Completion must be documented on an official transcript from either institution. Transfer courses accepted by The American College may include courses with S, P, HP, or letter grades.

WCTC students can transfer an unlimited number of courses for credit into The American College Huebner School designation programs. However, students must take at least three courses from The American College in the pursuit of a specific certificate or designation from The American College.

An exception is made for students who are transferring credit from WCTC’s CFP® Board Registered Program into the ChFC® designation, or who currently hold the CFP® certification and are pursuing the ChFC® designation. Under the current curriculum, these students will need to complete HS314 (Applications in Financial Planning I) and HS319 (Applications in Financial Planning II) and successfully make a ChFC® Case Presentation to meet ChFC® designation requirements.

The ChFC® Case Presentation will have a reduced tuition rate, and students will complete an oral presentation based on the submission of a financial plan. Students are free to submit a financial plan of their choosing. Student presentations must meet requirements of The American College case presentation grading rubric, currently utilized in HS 333 (Personal Financial Planning: Comprehensive Case Analysis).

Note: This transfer of credit agreement may be amended at a later date due to programmatic changes, including the possible addition of a ChFC® Practicum course.

The American College Programs	Waukesha County Technical College Credits
CFP® (Certified Financial Planner™ curriculum) CLU® (Chartered Life Underwriter®) ChFC® (Chartered Financial Consultant®)	Undergraduate, 7 courses, 21 transfer credits Undergraduate, 8 courses, 24 transfer credits Undergraduate, 9 courses, 27 transfer credits

Course equivalencies between The American College programs and programs at WCTC, if any, will be articulated in an Addendum when approved by both parties.