

CLU[®] Requirement - Four Years Experience

At the time of application to The Institute for their CLU designation, all candidates must attest to having completed at least **four** years of experience within, or related to, the financial-service industry.

The experience requirement is inclusive of management, staff, academics, writers, students and volunteers engaged directly or indirectly within the financial-services industry, as well as financial advisors.

Name: _____

ID#: _____

Company: _____

Address: _____

Number of years employed at this company: _____

Supervisor's Name: _____

Supervisor's Signature: _____

***If you are self-employed and do not have a supervisor/manager/executive who can sign your form, the Institute recommends a resume, contract letter, or some other documentation that outlines your employment history and experience.**

Describe relevant positions related to the financial-services industry (minimum of four years of experience is required). Attach additional information, if necessary:

Management (position and duration): _____

Staff (position and duration): _____

Academic (area of academia and duration): _____

Writer (description and duration): _____

Student (area of study and duration): _____

Volunteer (experience and duration): _____

Other: _____