

Chartered Life Underwriter (CLU[®]) Reinstatement Application Form

Personal Information

Mr. Ms. Miss Mrs. Advocis ID no. (if applicable)

First Name _____ Initial _____ Last Name _____

Mailing Address

Company Name _____

Street Address _____ City _____ Province _____ Postal Code _____

Telephone _____ Fax _____ Email Address _____

CLU Designation Reinstatement Affirmation

- I hereby apply for reinstatement of authorization to use the CLU designation and have read the reinstatement policy.
- I understand that The Institute Trustees may reinstate a CLU practitioner's right to use the CLU designation either on a conditional or unconditional basis.
- I understand that only those practitioners reinstated and therefore, authorized by The Institute, may hold themselves out as a CLU designation holder.
- I have attached a written summary outlining my practice during my absence, including other useful information I feel pertinent, including reasons as to why my CLU designation lapsed and/or why I cancelled my CLU designation.
- I hereby attest that I have maintained Continuing Education (CE) during my absence from The Institute. I have enclosed written proof of all CE Hours completed during this time and attest that the enclosed documents are accurate and true.
- I have read and agree to abide by The Institute's Code of Professional Conduct & Disciplinary Procedures.

Signature _____ Date _____

CLU Designation Reinstatement Policy

Reinstatement Policy

For lapsed designation holders applying for reinstatement, continuing education must be completed during the period of a lapsed designation and proof of completed CE must be provided before reinstatement will occur.

If a lapsed designation holder applies for re-instatement after having left The Institute, the following applies:

For all who apply for reinstatement and who have been absent for **three years or less**:

- Proof of the required continuing education credits taken during that period must be submitted with the application for reinstatement.
- Those applying for reinstatement will be required to pay the appropriate administration fees.

For all who apply for reinstatement and who have been absent for **more than three years**:

- Proof of the required continuing education for the three years prior to the application for reinstatement must be submitted.
- Those applying for reinstatement will be required to challenge the Advanced Estate Planning course exam including appropriate exam and administration fees.

2019 Annual maintenance of the CLU designation includes:

- an annual fee of \$371 plus applicable taxes
- adherence to The Institute Code of Professional Conduct, and
- a minimum of 30 continuing education (CE) credits each calendar year, one credit of which must be from a recognized Ethics program. A minimum of 15 CE credits must be accredited by The Institute; a maximum of 15 CE credits can be approved by The Institute. Any deficiency in one year must be made up by the end of the next calendar year, in addition to the full year's necessary requirement of CE credits. For more information, please visit www.iafe.ca.

Reinstatement Application

All questions contained in this form must be answered in order for the CLU designation to be reinstated for the 2019 year. Failure to properly and fully complete this document, including the submission of payment for the required fees, will result in an incomplete submission. This will in turn delay the reinstatement of the CLU marks and usage rights.

The term for the CLU marks and the usage rights are granted for a one-year basis and expires by the end of the day December 31 of each calendar cycle. A CLU designation holder who fails to meet all continuing obligation requirements risks having his or her designation revoked due to non-compliance.

