
PAYMENT METHOD

All fees are in Canadian funds and can be paid by money order, certified or corporate cheque, Visa, MasterCard or Amex. Please make money orders, certified or corporate cheques payable to CSI Global Education. CSI cannot process forms received without payment information or proper payment. **NOTE: All fees are taxable as well as non-refundable. Please refer to https://www.csi.ca/student/en_ca/student/policies/fees.xhtml - Tax Information.**

IMPORTANT: Please include: Annual Licence Renewal Fee \$275.00.

If you hold 2 or more of these CSI Designations (FCSI®, CIWM, PFP®, CIM® or MTI®) in good standing, you may be entitled to a discount:

# of CSI Designations you hold in good standing	1	2	3	4
Discount per designation	\$0	\$50	\$100	\$150
<u>Cost per designation after the discount</u>	\$275	\$225	\$175	\$125

Late renewals, if done within 12 months of your licence renewal date, are subject to a Late Fee of \$50.

If you have not renewed within 12 months of your license renewal date, you will be required to pay a late fee of \$50, a reinstatement fee of \$275 and the standard annual licence renewal fee of \$275. You will also be asked to prove completion of your CE requirements for all the years of non-renewal. This will require you to submit transcripts showing course completion dates as well as course outlines.

Exclusive Professional Development (PD) CE Offer for Designation holders ONLY:

- 1-Year ALL ACCESS PD CE Subscription: \$99
- Choose any 3-PD CE Package: \$49

(Note: You can only purchase one of the above two CE packages.)

I am paying with a: Money Order Certified Cheque Corporate Cheque, in the amount of: _____ \$ _____

Please charge my: Corporate Customer Account Number (Only if payer is employer) No: _____ \$ _____

I am paying with a credit card: Visa MasterCard Amex _____ \$ _____

Card Number: _____ Expiry Date (Month/Year): _____

Name of card holder: _____ Signature: _____

- Check if you are faxing this form. If you are faxing this form, you must pay by credit card. Do not mail this form to CSI if you are faxing it.
Doing so may result in you being charged twice.

IMPORTANT: As required by Payment Card Industry (PCI), CSI is unable to accept forms (with payment) received by email. Forms with payment information will be deleted immediately. Please fax or mail in your form to avoid delay.

PFP® CERTIFICATION MARK LICENSE AGREEMENT

As a holder of CSI Global Education's ("CSI") PFP® designation, you are licensed to use the PFP® certification mark (the "Certification Mark").

- Licensee acknowledges that CSI owns the entire right, title and interest to the Certification Mark.
- CSI hereby grants the Licensee a non-exclusive license to use the Certification Mark in association with the provision of financial services to the public for a one-year term, commencing on the date the Licensee is granted the PFP® designation. Licensee hereby explicitly acknowledges that Licensee is not entitled, by virtue of having earned this designation, to its use other than under the terms of this license. This Agreement and the license granted hereunder will be renewed automatically every year for another one-year term upon payment of an annual renewal fee and provided the Licensee is otherwise in compliance with all of the requirements associated with the PFP® designation and conveyed to Licensee by CSI.
- In order to maintain the right to continue to use the Certification Mark, Licensee agrees to maintain any and all standards for the character and quality of the services to be provided in association with the Certification Mark. CSI shall convey such standards to Licensee from time to time. Such standards shall include but not be limited to the PFP® Code of Ethics. Licensee also agrees to earn any continuing education credits required by CSI.
- Licensee agrees that CSI may monitor the provision of services provided by Licensee in association with the Certification Mark and that, in the event CSI determines that the quality of those services do not meet the standards set by CSI, CSI may terminate the license upon 60 days notice. Licensee agrees that the final determination with respect to the termination of this license shall be made by the Designation Ethics Committee. Upon termination of this license, Licensee shall immediately cease to use or display the Certification Mark and/or PFP® Trademark for any purpose whatsoever.
- Licensee shall at all times display the Certification Mark in accordance with the Certification Mark guidelines:

As a Licensee of the Certification Mark:

- You can use the Certification Mark as a distinctive visual symbol of the PFP® designation that can be easily recognized by employers, colleagues, and clients. In essence, as a designation holder, you can use this mark as a seal of quality and integrity.
 - The Certification Mark may not be altered or modified in any way.
 - To ensure that the Certification Mark appears properly, all reproduction of the Certification Mark must be made from camera-ready artwork provided by CSI.
 - The Certification Mark can be used to identify a group of individuals; however, each individual listed must be current PFP® designation holders.
 - The Certification Mark must not be used as part of a company name.
 - The Certification Mark should be placed in close proximity to the Licensee's name. However, the Certification Mark should have enough clear space that it is not connected to a part of the Licensee's personalization or degree. The Certification Mark shall not be confused with a company logo or placed in such close proximity to a company name or logo so as to give the reader the idea that the Certification Mark certifies the company.
- Licensee agrees to notify CSI, without delay, of any circumstances that may affect the licensee's ability to continue to fulfill the certification requirements.