



# **Student Handbook**

Solomon S. Huebner School  
Designation Programs

The policies and procedures appearing in this Handbook have been approved under the authority of The American College Board of Trustees and constitute official College policy.

All students pursuing coursework through the Solomon S. Huebner School should familiarize themselves with the contents of this Handbook. The policies presented herein outline both student rights and responsibilities.

The content of the Handbook may change as necessary to strengthen The College's procedures and processes. The College reserves the right to revise this Handbook at any time.

All students pursuing designation studies at The American College are responsible for knowing and abiding by the terms of this Handbook.

Questions related to the Handbook may be directed to the Professional Education Department, The American College of Financial Services, 270 S. Bryn Mawr Ave., Bryn Mawr, PA 19010 or [ProfessionalEducation@TheAmericanCollege.edu](mailto:ProfessionalEducation@TheAmericanCollege.edu) or by calling 888-263-7265.

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# HUEBNER SCHOOL DESIGNATION PROGRAMS

Founded in 1927 by industry pioneer Solomon S. Huebner, The American College of Financial Services has a long history in providing financial services education. The College graduated its first designees in the Chartered Life Underwriter<sup>®</sup> (CLU<sup>®</sup>) program in 1928. Since then, The College has awarded more than 200,000 professional designations to individuals working in financial services, serving as a standard bearer for quality education in the field.

Professional designations in insurance, financial planning, retirement income planning, and agency leadership are offered through The College's Solomon S. Huebner School. The College's accreditation by the Middle States Commission on Higher Education extends to the Huebner School programs, which are transferable as undergraduate coursework to other accredited colleges and universities.

## Length of Programs

With the exception of the Wealth Management Certified Professional<sup>™</sup> (WMCP<sup>™</sup>) program, Huebner School designation programs range in length from three to nine courses. The duration of each course is approximately four months, but students complete coursework at their own pace. Most students progress through their declared program one course at a time, taking anywhere from one to three years to complete the program. Others progress more rapidly, completing entire programs in under a year. The College's 5-Year Rule (see *Policy on Satisfactory Academic Progress*) requires students to complete their declared designation program within five years to maintain the currency of their coursework.

The WMCP<sup>™</sup> program is offered through a single integrated enrollment and is expected to be completed within 12 months of enrollment.

## Program Completion

To receive a Huebner School designation, students must successfully complete all coursework and pass course examinations in their declared program, meet the experience requirement (described below) with no ethics violations, and agree to comply with The American College Code of Ethics (see below). The Office of the Registrar determines and certifies that a student has completed all requirements. (Note that CFP<sup>®</sup> certification is awarded by CFP Board, which has its own requirements. Visit <https://www.cfp.net/become-a-cfp-professional/cfp-certification-requirements> for more information.)

Once certified, a student is considered to have graduated with all of the rights, privileges, and obligations pertaining thereto. Designations are delivered to students at their address of record and new designees are invited to participate in The College's periodic commencement exercises.

Graduates of Huebner School designation programs are required to meet The College's professional recertification requirement on an annual basis to maintain the currency of their designation(s). The recertification requirement is described below.

## **Experience Requirement**

Three years of full-time business experience related to the subject area of one's declared program is required for all Huebner School designations. For example, the following activities meet the business experience requirements for Huebner School certification:

### 1. Insurance and healthcare

- Field underwriting and management, including sales and service activities, supervision and management of persons involved in sales or services, or staff support of persons in these activities
- Company management and operations in positions involving substantial responsibility

### 2. Financial services and employee benefits

- Client service and related management, including direct contact with clients, supervision and management of persons involved directly in the process of providing financial services or employee benefits, or staff support of persons in these activities
- Financial institution management and operations in positions involving substantial responsibility

### 3. Other

- University or college teaching of subjects related to the Huebner School curriculum on a full-time basis at a regionally-accredited institution of higher education
- Government regulatory service in a related field in a responsible administrative, supervisory, or operational capacity
- Activities directly or indirectly related to the protection, accumulation, conservation, or distribution of the economic value of human life; these include the work of actuaries, attorneys, CPAs, investment advisers, real estate investment advisers, stockbrokers, trust officers, or persons in other similar occupations

The three-year period of required experience must be within the five years preceding the date of the award. An undergraduate or graduate degree from an accredited institution of higher education qualifies as one year of business experience. Qualifying part-time business experience is credited toward the three-year requirement on an hourly basis, with 2,000 hours representing the equivalent of one year of full-time experience.

## **Professional Recertification Requirement**

Since its founding in 1927, The American College of Financial Services has been committed to serving the public through increasing the knowledge and professionalism of financial advisors. As part of that commitment, every designee of The College agrees to adhere to our Code of

Ethics, which includes a professional pledge and eight canons that address ongoing education and ethical standards.

The College believes that individuals who use our designations to represent their expertise to consumers have an obligation to the public to practice ethically and engage in ongoing professional education, something that is particularly important in today's environment of complex products and regulations.

The College has implemented an expanded Professional Recertification Program, which builds on the tradition of the long-standing Professional Achievement in Continuing Education (PACE) program. On January 1, 2017, PACE recertification requirements officially transition to the expanded Professional Recertification Program.

### **Course Registration**

Students may register online or by phone.

- To register online: go to [www.TheAmericanCollege.edu](http://www.TheAmericanCollege.edu) and look for "Enroll Now".
- To register by phone: call the Professional Education Department at 888-263-7265 Monday – Friday, 8 a.m. to 6 p.m. EST

Payment is required at time of registration. Consult the College website for the costs associated with different course enrollments.

### **Financial Obligations**

Students are responsible for the payment of all financial obligations upon enrollment. Course materials will not be shipped and access to online materials will not be made available until any balance due is paid. No designation will be awarded to any student with a balance due.

### **Required Student information**

Specific student information is required at the time of enrollment and at graduation. Most importantly, students are responsible to provide their Social Security number and current contact information.

### **Transfer of Credit**

The credit transfer policy for Huebner School courses permits a student who completed comparable courses at an accredited college or university, or in The American College Irwin Graduate School, to apply for transfers of credit into certain Huebner School programs, provided the courses were completed within seven years prior to the application date and the student earned a grade of "C" or better in each course. In addition, students who recently earned one or more of the following pre-approved professional designations below may be eligible to receive credit for courses in the ChFC<sup>®</sup>, CLU<sup>®</sup>, and/or CFP<sup>®</sup> certification programs: **ALHC, AIRC, APA, CEBS, CFA, CFP<sup>®</sup>, CPA, CPC, QPA, FALU, FLMI, FSA, HIA, MHP.**

In reviewing an application for transfer of credit into one of our programs, The College will review the title and course description of courses completed externally and compare those to the College courses to which the student wishes to have the credits applied. Transfer of credit is normally granted if The College believes there is a 75 percent or greater overlap in content. Students must be admitted to The American College of Financial Services before any transfer of credit can be posted.

The College's Transfer of Credit policy can be viewed under the Resources section on The College website. Contact the Professional Education Department at 888-263-7265 for additional information.

## **Obtaining Transcripts**

Because The American College of Financial Services is a regionally accredited college, many colleges and universities will accept credits earned here as applicable to their programs. It is the receiving institution's prerogative to decide what credits they will or will not accept. We advise other institutions that our Huebner School courses are worth three (3) credits at the upper tier (junior or senior) undergraduate level. This information is advisory in nature, and receiving institutions can accept or reject it as they see fit.

Students should contact the Professional Education Department (PED) at 888-263-7265 or [ProfessionalEducation@TheAmericanCollege.edu](mailto:ProfessionalEducation@TheAmericanCollege.edu) to request an official transcript. If another institution requires course syllabi or other documentation of course content for transfer of credit purposes, PED can also assist students in obtaining those documents. Students may view their unofficial transcript online through their student account. There is a fee for obtaining an official transcript.

## **The American College Code of Ethics**

*To underscore the importance of ethics for our program completers, all Huebner School designees must adhere to The College's Code of Ethics, which consists of the Professional Pledge and The Canons. A designation may be removed for violations of these standards.*

### **The Professional Pledge**

"In all my professional relationships, I pledge myself to the following rule of ethical conduct: I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that service which, in the same circumstances, I would apply to myself."

### **The Canons**

- I. Conduct yourself at all times with honor and dignity.
- II. Avoid practices that would bring dishonor upon your profession or The American College of Financial Services.
- III. Publicize your achievements in ways that enhance the integrity of your profession.



IV. Continue your studies throughout your working life so as to maintain a high level of professional experience.

V. Do your utmost to attain a distinguished record of professional service.

VI. Support the established institutions and organizations concerned with the integrity of your profession.

VII. Participate in building your profession by encouraging and providing appropriate assistance to qualified persons pursuing professional studies.

VIII. Comply with all laws and regulations, particularly as they relate to professional and business activities.

The College's certification officer is empowered by the Board of Trustees to ensure compliance with all of the requirements necessary to obtain and continue using The College's designations and to enforce the Code of Ethics. The certification officer will investigate any complaints or reports of violations, which may originate with state commissioners of insurance, other public and judicial bodies, individuals, and established institutions or organizations. In certain instances, The College itself may initiate action based on apparent violations.

Violations that may cause the certification officer to begin an investigation include conviction for a misdemeanor or felony, and suspension or revocation of a license or of membership in an established institution or organization.

The College's disciplinary process can result in a designee's loss of the right to use a designation. The process follows a detailed written policy, and if a designation is removed, the appropriate adjustment is made to the designation verification database on [DesignationCheck.com](http://DesignationCheck.com).

## **DESIGNATION PROGRAM DESCRIPTIONS**

Following are descriptions of the goal and purpose, intended audience, program learning objectives, and curriculum of each of the Huebner School designation programs:

- Certified Financial Planner (CFP®) Education Program
- Chartered Financial Consultant® (ChFC®) Designation Program
- Certified Life Underwriter® (CLU®) Designation Program
- Certified Leadership Fellow® (CLF®) Designation Program
- Chartered Special Needs Consultant® (ChSNC®) Designation Program
- Retirement Income Certified Professional® (RICP®) Designation Program
- Wealth Management Certified Professional™ (WMCP™) Designation Program

# ***Certified Financial Planner® (CFP®)***

## **Mission**

The mission of the Certified Financial Planner® (CFP®) education program is to prepare students to meet the financial planning needs of consumers and to qualify for Certified Financial Planner® certification by passing the certification exam established by CFP® Board. This mission is achieved by providing students with expert-led instruction in the general principles of financial planning, estate planning, investments, retirement planning, personal and commercial risk management (insurance), and income tax.

## **Target Audience**

- Financial service professionals striving to obtain the CFP® designation. Financial service professionals include those currently working as or managing insurance agents, brokers, financial advisors, bankers, commercial bankers and brokerage, and insurance company support employees
- Individuals who are not currently engaged in the financial service industry striving to earn the CFP® designation
- Students studying in the Chartered Life Underwriter (CLU®) or Chartered Financial Consultant Program (ChFC®) who are taking core financial planning courses and become interested in pursuing the CFP® designation in tandem with other education from The American College of Financial Services

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Function as an ethical, competent and articulate practitioner in the field of financial planning
- 2) Demonstrate mastery of the core financial planning knowledge required of a Certified Financial Planner™ by passing the CFP® certification exam
- 3) Utilize the intellectual tools and framework needed to maintain relevant and current financial planning knowledge and strategies throughout one's career in financial services
- 4) Apply financial planning theory and techniques through the development of case studies and solutions

## **CFP® Curriculum**

Students must complete the following required courses.

<b>Course Number</b>	<b>Course Title</b>
HS 300	Financial Planning: Process and Environment
HS 311	Fundamentals of Insurance Planning
HS 321	Income Taxation
HS 326	Planning for Retirement Needs
HS 328	Investments
HS 330	Fundamentals of Estate Planning
HS 333	Personal Financial Planning: Case Analysis

# **Chartered Financial Consultant® (ChFC®)**

## **Mission**

The mission of the Chartered Financial Consultant® (ChFC®) designation program is to prepare students to meet the advanced financial planning needs of individuals and professionals. This mission is achieved through expert instruction not only in the seven required CFP® courses in financial planning, but also in application courses covering advanced estate planning, nonqualified deferred compensation, and retirement planning. The ChFC® program provides in-depth education enabling program completers to achieve a sustainable advantage in this specialized and competitive field.

## **Target Audience**

In addition to the constituencies of the CFP® program (i.e., individuals specifically seeking CFP® certification), the intended audience consists of advisors or individuals seeking in-depth knowledge from content areas including estate planning, retirement planning (including plan design and selection of a distribution option), and nonqualified deferred compensation.

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Function as an ethical, competent and articulate practitioner in the field of financial planning
- 2) Demonstrate mastery of the core financial planning knowledge required of a Certified Financial Planner™ by passing the CFP® certification exam
- 3) Utilize the intellectual tools and framework needed to maintain relevant and current financial planning knowledge and strategies throughout one's career in financial services
- 4) Apply financial planning theory and techniques through the development of case studies and solutions
- 5) Apply in-depth knowledge in a holistic manner from a variety of disciplines; namely, estate planning, retirement planning or nonqualified deferred compensation.

## **ChFC® Curriculum**

Students must complete the required courses listed below.

<b>Course Number</b>	<b>Course Title</b>
HS 300	Financial Planning: Process and Environment
HS 311	Fundamentals of Insurance Planning
HS 314	Applications in Financial Planning I
HS 319	Applications in Financial Planning II
HS 321	Income Taxation
HS 326	Planning for Retirement Needs
HS 328	Investments
HS 330	Fundamentals of Estate Planning
HS 333	Personal Financial Planning: Case Analysis

# **Chartered Leadership Fellow® (CLF®)**

## **Mission**

The Chartered Leadership Fellow® (CLF®) designation program is designed to develop students' management and leadership skills. There is a strong emphasis on ethical application of the academic concepts to the real world environment in order to increase professionalism across the industry. Students have the option to take this designation in the Office Track or Field Track.

## **Target Audience**

### *Office Track*

- Home office supervisors or managers with three to five years of experience
- Agency office managers seeking in-depth managerial and leadership knowledge and skills

### *Field Track*

- Financial services professionals with three years of experience in a managerial role such as regional vice presidents, regional/district managers, managing directors, managing partners, field managers, or sales managers

CLF® students are individuals who have been in management positions for at least two years and seek to develop their management and leadership skills in an effort to better recruit, select, develop, motivate, and monitor high performing individuals and teams.

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Apply ethical standards and best practices in management and leadership
- 2) Demonstrate an understanding of the process of recruiting, selecting, developing, motivating, and monitoring high performing advisors and teams
- 3) Apply a diverse set of management and leadership techniques that address the changing work environment and the need for effective communication and interpersonal skills in team building efforts
- 4) Utilize problem solving and decision processes to create a competitive advantage through locally effective strategic plan development that is in alignment with organizational goals and priorities
- 5) Analyze and assess managers' impact on and decisions regarding the critical support functions of marketing and human resource management.
- 6) Integrate the CLF® curricula into solutions for applied, real-world scenarios

## CLF® Curriculum

Students must complete the courses specific to the program track they select in addition to these required courses.

Course Number	Course Title
HS 382	Leadership in a Changing World
HS 383	Interpersonal Relationships in the Workplace
HS 384	Creative Problem-Solving and the Strategic Planning Process

Required courses for students in the **Office Track**

Course Number	Course Title
HS 387	Marketing Management of Financial Services
HS 388	Human Resource Management
HS 389	Capstone: Leading in the Office Environment

Required courses for students in the Field Track

Course Number	Course Title
HS 371 or HS 381	Essentials of Management Development Integrated Leadership Practices/Professional Patterns of Management
HS 372 or HS 373	Field Leadership Series Workshops Practice Management Concepts for Agency Managers
HS 385*	Capstone: Leading the Marketing Organization of the Future
HS 386	Field Management Seminar

\* HS 385 is offered only in residency format. Students pursuing the CLF Field track will be required to complete this course in residence at The American College campus in Bryn Mawr, PA.

# **Chartered Life Underwriter® (CLU®)**

## **Mission**

The mission of the Chartered Life Underwriter® (CLU®) designation program is to prepare students to meet the advanced insurance and financial planning needs of individuals, families and business owners. Specifically, CLU® designees offer client solutions in personal and business risk-management, business succession, estate planning, life insurance and annuities, and income replacement in retirement in accordance with the highest ethical standards.

## **Target Audience**

The intended audience for the CLU® program consists of life insurance specialists and other financial professionals who wish to develop a strong understanding of the use of life insurance to solve financial issues. These practitioners are expected to serve the advanced financial planning needs of individual clients, business owners, and professionals in an ethical and professional manner.

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Provide guidance to clients on types and amounts of life insurance needed
- 2) Make recommendations on aspects of risk management, including personal and business uses of a variety of insurance solutions
- 3) Provide guidance to clients on legal aspects of life insurance contracts and beneficiaries
- 4) Assist clients in making decisions about estate planning, including proper holding of assets and title to assets, as well as the implications of various wills and trust arrangements on financial, retirement and succession planning issues
- 5) Provide a holistic and comprehensive approach to addressing the insurance planning needs of their clients

## **CLU® Curriculum**

Students must complete three elective courses from the list of eligible Huebner School courses in addition to the required courses listed below.

<b>Course Number</b>	<b>Course Title</b>
HS 311	Fundamentals of Insurance Planning
HS 323	Individual Life Insurance
HS 324	Life Insurance Law
HS 330	Fundamentals of Estate Planning
HS 331	Planning for Business Owners and Professionals

Elective courses include: HS 300 (Financial Planning: Process and Environment), HS 313 (Individual Health Insurance), HS 321 (Income Taxation), HS 325 (Group Health Benefits), HS 326 (Planning for Retirement Needs), HS 328 (Investments), HS 334 (Estate Planning Applications), HS 375 (Introduction to Disability), and HS 376 (Legal and Financial Issues for Special Needs Families).

# **Chartered Special Needs Consultant® (ChSNC®)**

## **Mission**

The mission of the Chartered Special Needs Consultant® (ChSNC®) designation program is to provide state-of-the-art education to prepare students to guide clients with respect to financial planning implications for a family member with a disability. The program addresses the emotional and educational needs of the disabled family member as well as the important legal, ethical, and financial considerations faced by the family.

## **Target Audience**

ChSNC® students are individuals who have met the requirements for a generalist professional designation (i.e., CLU®, ChFC®, or CFP®), or have an appropriate graduate degree (e.g., MSFS or equivalent) and seek to develop the skills to participate more effectively in a planning team assisting families with the special educational, legal, and financial considerations facing a disabled individual.

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Determine the options for funding costs associated with the medical and housing needs of a disabled individual
- 2) Demonstrate expertise with respect to qualifications for public resources for a disabled individual
- 3) Apply ethical practices with respect to joint representation of the interested family members and the disabled individual.
- 4) Identify and understand key income tax and estate planning opportunities available to families with a special needs child.

## **ChSNC® Curriculum**

Students must complete the following required courses.

<b>Course Number</b>	<b>Course Title</b>
HS 375	Introduction to Disability
HS 376	Legal and Financial Issues for Special Needs Families
HS 377	Financial Planning for Special Needs Families

Students who have completed the coursework listed above must hold a CLU®, ChFC®, or CFP® designation, PFS credential, or master's degree in financial planning (or equivalent areas of study) to be awarded the ChSNC® designation.



# **Retirement Income Certified Professional® (RICP®)**

## **Mission**

The mission of the Retirement Income Certified Professional® (RICP®) designation program is to provide comprehensive knowledge and skills that enable financial service professionals to ethically create and maintain an effective retirement income plan for their clients. An effective retirement income plan is one that meets a client's goals and addresses the associated risks.

## **Target Audience**

The RICP® program is designed for advanced professionals with at least three years of financial service industry experience and a general financial planning credential (e.g., ChFC®, CLU®, CFP®), or who specifically focus their practice on retirement income planning.

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Create an effective and ethical retirement income plan to maintain a client's desired lifestyle over the course of retirement
- 2) Prepare alternative solutions to mitigate retirement risks and address tax considerations
- 3) Choose appropriate strategies for generating income from a client's existing assets
- 4) Assist clients in determining their optimal age for retirement and claiming Social Security
- 5) Evaluate resources that can be used to support a financially secure retirement

## **RICP® Curriculum**

Students must complete the following required courses.

<b>Course Number</b>	<b>Course Title</b>
HS 353	Retirement Income Process, Strategies and Solutions
HS 354	Sources of Retirement Income
HS 355	Managing the Retirement Income Plan

# **Wealth Management Certified Professional™ (WMCP™)**

## **Mission**

The mission of the Wealth Management Certified Professional™ (WMCP™) program is to teach students how to develop informed, research-based investment portfolios and strategies that assist clients in reaching their long-term goals. The program emphasizes how to strategically use investments to meet the goals of individual investors.

## **Target Audience**

The WMCP™ program is designed for professionals with at least three years of financial services experience who have a fundamental knowledge of financial planning.

## **Program Learning Objectives**

Upon completion of this program, the student should be able to:

- 1) Employ a life-cycle, goal-based process for planning and managing client wealth
- 2) Create an efficient investment portfolio
- 3) Evaluate financial instruments
- 4) Formulate a wealth management strategy
- 5) Provide solutions for complex wealth management needs

## **WMCP™ Curriculum**

Students must complete the following required course.

<b>Course Number</b>	<b>Curriculum Title</b>
HS 348	Wealth Management Certification

The WMCP™ curriculum is offered through a single, comprehensive online enrollment. The online learning platform adapts the curricular content to create a customized learning path for each student, based on the student's prior knowledge. The curriculum begins with a foundational knowledge of financial economics, including portfolio and life-cycle theory, and builds on those theories with applied lessons on advanced wealth management topics including:

- Creating tax-efficient, diversified investment portfolios to fund future client goals
- Analyzing a broad range of financial instruments
- Evaluating the unique wealth management needs of business owners and executives
- Developing strategies to meet estate and charitable planning goals
- Incorporating behavioral finance to improve client outcomes

The curriculum incorporates five simulations to provide an opportunity for experiential learning, where students can practice the concepts learned. The curriculum and simulations are designed to build an advisor's competence and confidence in wealth management to address a wide range of client situations.

# INSTRUCTIONAL DELIVERY FORMATS

Courses in the Huebner School (HS) designation programs are offered in the following instructional formats:

- Self-Study
- Live Webinar
- Intensive Review Program (IRP)
- Residency (HS 385)
- Competency-based Self-Study (WMCP)

The *Live Webinar and Intensive Review* formats are considered enhancements to the self-study format and are available for most courses in the CFP<sup>®</sup>, ChFC<sup>®</sup>, and CLU<sup>®</sup> curricula. Some courses in the CLF<sup>®</sup> and ChSNC<sup>®</sup> programs are also available in the Live Webinar format. The schedule of availability varies by course for the webinar and intensive review formats. The CLF<sup>®</sup> Field capstone course, HS 385, is available only as an on-campus *Residency course*.

Below is information about each instructional format, the differences between the formats, and the courses to which they apply.

## Self-Study

Learning Resources. The self-study format provides students with access to a range of electronic and hard copy instructional materials and resources, which they may use at their own discretion and according to their preferred study patterns and schedules.

- *Electronic Resources* are available upon course enrollment through *Blackboard*, The College's learning management system. Electronic resources available in Blackboard are listed at the bottom of this section.
- *Hard copy textbooks* are included with most Huebner School courses. For the RICP<sup>®</sup> program, hard copy materials are available only through download from Blackboard.

Students receive access to Blackboard within 24 hours of when they enroll in a course. Returning students continue using the same Blackboard login as they progress through subsequent courses in their program. Textbooks are shipped to students within 48 hours of enrollment.

*Managing Your Studies.* Self-study students manage their own studies by accessing the study materials and resources they choose to use and following their own study process and schedule.

- Many courses offer a list of sections to complete in order to progress through the course in 6, 8, or 10 weeks, depending on the student's preference. *Students are strongly encouraged to establish their own schedule and to stick to the schedule they develop.*
- Use the Blackboard navigation tools to enter a course in which you are enrolled and to access the instructional resources available for the course.

All Huebner School courses are available in Self-Study format except HS 333 and 377 (webinar only) and HS 385 (residency only).

Learning resources available in Blackboard (not applicable to the WMCP™ program)

The following resources are available in Blackboard. A description of each is provided in the Learning Resources section of this handbook.

- Course Syllabus
- E-book Textbook
- E-book Supplement
- Video Lectures and Presentations
- Audio Lectures
- Sample/Practice Exams
- Chapter Quizzes
- Key Terms Exercises
- Online Review Sessions (RICP® only)

## **Live Webinar**

The Live Webinar format is available at an additional cost for courses in the CFP®, ChFC®, and CLU® programs and some courses in the CLF® and ChSNC® programs. Availability of webinar sections varies by course.

Courses offered in Live Webinar format are delivered as self-study courses that include weekly webinar classes conducted by an expert instructor who presents the course material in a series of live online sessions. In addition to providing live instruction, the webinar structure helps keep students on track for course completion within a specified timeframe. This format includes:

- Two 2.5-hour webinar sessions per week for four weeks
- Each webinar class is recorded so that students can access the archived sessions as often as they want during the time their course is active.

All of the learning resources available through Self-Study are available to students taking a course via the Live Webinar format. Outside of the weekly webinar classes, students manage

their own studies by accessing the study materials and resources (including archived webinars) they choose to use and following their own study process and schedule.

Contact The College's Professional Education Department at 888-263-7265 or [ProfessionalEducation@TheAmericanCollege.edu](mailto:ProfessionalEducation@TheAmericanCollege.edu) for information about dates and availability of Live Webinar classes.

### **Intensive Review Program**

The in-person Intensive Review Program (IRP) format is available at an additional cost for required courses in the CFP<sup>®</sup> and CLU<sup>®</sup> programs, and some other courses on an ad hoc basis. Availability of IRP sections varies by course.

Courses offered in IRP format are delivered as self-study courses that include a final, intensive, in-person review conducted by an expert instructor who reviews the material covered across the entire course during a 20-hour intensive session conducted over a two-and-a-half day period (typically offered Friday through Sunday). Students are expected to prepare in advance through self-study, bringing questions they have to the final review session.

All of the learning resources available through self-study are available to students taking a course via the IRP format. Except for the final IRP review session, students manage their own studies by accessing the learning materials and resources they choose to use and following their own study process and schedule.

Contact The College's Professional Education Department at 888-263-7265 or [ProfessionalEducation@theamericancollege.edu](mailto:ProfessionalEducation@theamericancollege.edu) for information about dates and locations of IRP sessions.

### **HS 385 Residency Class**

HS 385, the CLF<sup>®</sup> Field capstone course, is a four-day live course offered only in residency at The American College of Financial Services campus in Bryn Mawr, Pa. While materials for this course are available online through Blackboard, students complete their actual coursework on site at The College. For further information, contact CLF<sup>®</sup> program administration at 610-526-1335.

### **Competency-based Self-Study (WMCP)**

The WMCP<sup>™</sup> learning experience is a self-study instructional delivery format unlike The College's other self-study programs. Students receive access to an immersive learning

environment through our student portal. Upon entry into the learning environment, each student will take a pre-assessment that creates a customized recommended learning path for the student based upon his or her entering competency levels. As the student progresses through the program and receives feedback, the learning environment adjusts the learning path to focus on what the student needs to learn to be successful.

Central to the learning experience are a series of advanced simulations, knowledge checks, behavioral self-checks, interactive text and learning objects, illustrations, video presentations, and sample exams designed to enhance comprehension and provide students with the methods and techniques for accessing the information that is most relevant to a client's particular situation.

## LEARNING RESOURCES

Upon enrollment, students are provided with an online portal (MyPortal), through which they can access course materials, track their academic progress, enroll in subsequent courses, recertify completed designations, and download grade reports, receipts, and unofficial transcripts. If applicable, students will also receive any hard copy materials (textbook, etc.) provided for their course within seven to 10 business days of enrollment. (Please note: not all courses include hard copy materials.)

Below is a description of the learning resources that are available for Huebner School courses for programs other than Wealth Management Certified Professional™ (WMCP™). WMCP™ is offered entirely through a stand-alone, interactive, online learning platform.

- **Blackboard** – Blackboard is The American College’s Online Learning System that provides students 24/7 access to all of the electronic learning materials that are available for a course. Blackboard gives the student the ability to interact with instructors and peers, review and/or download specific course materials, complete assignments, assess progress with practice quizzes and exams, and access library resources.
- **Textbook** – Except for courses in the WMCP™ and RICP® curricula, The American College courses have an accompanying textbook written by College faculty or, in some cases, by a third party external to The College. Textbooks are shipped to students upon enrollment in a course. Textbooks written by College faculty are also available in electronic format and are downloadable in multiple formats from within Blackboard. Courses in the RICP® curriculum offer detailed course notes, accessible through Blackboard and available for download in PDF, .epub, and .mobi formats, which serve as substitutes for traditional textbooks.
- **E-book Textbook** – Course textbooks written by College faculty are available for download to mobile devices and computers in multiple formats including PDF, .epub, and .mobi.
- **Course Syllabus** – Each course syllabus provides a description of the course, an outline/summary of the topics covered, the course learning objectives, descriptions of available study materials, information about the faculty member responsible for the course, and other information as appropriate.
- **Chapter Learning Objectives** - Learning objectives for each chapter or course unit are provided in the textbook and in Blackboard. Questions on course exams come directly from the chapter learning objectives.
- **Study Plan** –Some courses provide suggested study plans in Blackboard for completing the course in 6, 8, or 10 weeks. Students are strongly encouraged to develop a specific study plan and stick to it. Using a defined study plan ensures that students complete their coursework within the required timeframe.
- **Video Lectures and Presentations** – Courses offerings include videotaped lectures and presentations of course content. Courses contain varying amounts of video resources depending on the course and subject matter. The RICP® program employs an alternate

educational delivery method that highlights video discussions and lectures as the primary form of content delivery. Video presentations are available for download to mobile devices and computers.

- **Audio Lectures** – Many courses contain audio lectures that can be used as a supplemental resource. Audio materials are available in Blackboard for download to mobile devices and computers. Courses contain varying amounts of audio depending on the course and subject matter.
- **Sample/Practice Exams** – Courses at The College include practice exams that vary in length from 25 to 100 questions depending on the course. The practice exams can be used to help determine readiness for the course exam, but should not be considered to be a predictor of actual student performance on the course exam.
- **Chapter Quizzes/Questions** – Most courses contain true/false and/or short answer chapter review quizzes or questions. These can be used to review the main concepts covered in each chapter.
- **Key Terms Exercises** – The most important terms and concepts covered in most courses are highlighted for review in a separate exercise. These terms are generally provided in an interactive format allowing students to self-test their knowledge of the definitions.
- **Online Review Sessions (RICP<sup>®</sup> only)** – Live exam review webinars are available for each of the three courses in the RICP<sup>®</sup> curriculum. There are two three-hour webinars per course that address key points from each of the learning objectives covered in the course. If you are in the RICP<sup>®</sup> program, the webinars should be part of your exam preparation. Each session is recorded so that students can access the archived webinars as often as they want during the duration of their course.
- **Discussion Boards/Forums** – All courses provide an online discussion board for students to discuss topics and questions with others in their class.
- **Webinar Virtual Classes** – For most courses in the CFP<sup>®</sup>, ChFC<sup>®</sup>, and CLU<sup>®</sup> programs and some courses in other programs, The College offers a weekly live classroom in an online format. Students enrolled in a webinar section attend once or twice a week through our state-of-the-art virtual classroom, led by a member of The American College faculty. Each session is recorded so that students can access the archived webinars as often as they want during the duration of their course. Contact the Professional Education Department at 888-263-7265 for more information.
- **Student Help Site** – The student help site provides answers to frequently asked questions as well as detailed information about available learning resources.
- **Library Resources** – The Vane B. Lucas Memorial Library features one of the most robust, online collections of financial services information in the country. Our digital collection was developed to support students across all College programs and provides students with current and authoritative information on a broad range of topics in financial services.



## **Discussion Board Rules of Conduct**

The online Discussion Board/Forum is a component within Blackboard that enables students to communicate online in an asynchronous mode with fellow students. The purpose of this medium is to enable students to exchange ideas about course content and to receive assistance with their courses.

The following regulations apply to all communications via Discussion Boards:

- Keep comments respectful and appropriate. Inappropriate comments will be removed from the discussion forums.
- It is a violation of The College's Academic Integrity Policy to post specific information about any question on a course exam. Ethics violations will be brought to the attention of the Certification Committee and students found to be in violation of the *Academic Integrity Policy* may have current designations revoked or may be denied future designations.
- Please post content-related questions under the appropriate chapter, competency, or assignment heading, so that all students can benefit from the posting.
- All posts should be directly related to specific issues relevant to and covered in the course.
- The College requests that students be reasonable in the number of questions they ask. The College retains the right to limit the number of questions in any specific case.
- The College retains the right to remove older, redundant, or confusing postings, or postings considered inappropriate for any other reason.

## **Illegal Downloading and/or Distribution of College Materials**

Illegal downloading of audio or video materials, e-books, or any other copyrighted electronic material is prohibited. Violations brought to the attention of The College constitute a violation of the Code of Ethics and will be addressed through The College's judicial processes. Illegal downloading may also result in civil or criminal charges.

## STUDENT SUPPORT SERVICES

Our Professional Education Department (PED) is the student support team at The American College of Financial Services. PED counselors are available to answer questions about our educational programs and how to earn a designation or degree with The College. They also assist students with enrollment and a wide range of service requests. PED counselors are available Monday-Friday from 8 a.m. to 6 p.m. (ET) at 888-263-7265 or [ProfessionalEducation@TheAmericanCollege.edu](mailto:ProfessionalEducation@TheAmericanCollege.edu).

Students are encouraged to contact our PED counselors for information on:

- Educational programs
- Available learning resources
- Technical issues related to our online learning system
- Accessing course materials
- Any additional questions or issues related to specific courses, policies and processes

*Students who are new to online learning or who believe they may not be adequately prepared for a specific course are advised to contact PED to discuss their circumstances.* Resources are often available to assist students with any specific challenges they may encounter.

The American College of Financial Services offers a variety of resources to support its students in completing the program(s) in which they have enrolled. These include the following, which are described in detail in the [Instructional Formats](#) and [Learning Resources](#) sections of this handbook.

- A broad range of self-study tools
- Live webinar classes
- In-person intensive reviews
- Live online review sessions (RICP<sup>®</sup>)

### Instructional Assistance

The Academic Department has designated instructional assistants who are available Monday through Friday to help students with content related questions in CFP<sup>®</sup>, ChFC<sup>®</sup>, and CLU<sup>®</sup> courses. Information is provided in the Announcements section of these courses in Blackboard.

### Contacting Faculty

Each course homepage in Blackboard provides information about how to contact the instructor of the course. Course syllabi also provide instructor contact information. Students are asked to contact instructors using the modes of communication provided in these guidelines.

## **Exam Counseling**

Exam counseling is available for Huebner School students who have been unsuccessful in one or more of their exams. If exam counseling is desired, please contact PED at 888-263-7265.

# LIBRARY SERVICES

The Vane B. Lucas Memorial Library features one of the most robust online collections of financial services information available today. This digital collection was developed to support students across all of the College's programs and each resource provides current and authoritative information on the topics covered.

## Subject Guides

For students who are unfamiliar with The College's library resources, you can browse our online subject and help guides. *Subject guides* link you directly to publications and media on topics such as economics, estate planning, insurance, organizational management, retirement and pension planning, taxation, aging, wealth management, and the history of the financial services industry. *Help guides* provide tips and tutorials on everything from using an iPad to writing a research paper.

## Digital Resources

In addition to our comprehensive collection of proprietary study materials, database resources link students directly to the most current financial services news and data from the world's top publications. Database resources such as EBSCO host's Business Source Complete and ProQuest's ABI/INFORM Global operate on both mobile and desktop platforms, and provide access to:

- Nearly 18,000 business and finance e-books
- Nearly 5,000 scholarly journals
- More than 3,000 trade journals and general business magazines
- Nearly 2,500 market research reports
- More than 9,000 executive and analyst interviews

Other student database resources include:

- A.M. Best's Library Center
- Morningstar Investment Research Center
- Westlaw Campus Research
- Checkpoint

Library resources are available 24/7 via the "Library" tab in Blackboard. Library staff are available for assistance by appointment, 8:30 a.m. to 4:30 p.m. (ET), Monday through Friday. Staff can be reached at 610-526-1307 or [Library@TheAmericanCollege.edu](mailto:Library@TheAmericanCollege.edu).

# GRADING AND EXAMINATION PROCEDURES

## How Grades Are Assigned

Grades for most courses in the Huebner School programs are awarded based on students' scores on the final course exam. HS 333 and some courses in the CLF<sup>®</sup> program have alternative assessment procedures determined by the professor of the course. As appropriate, these are described in the course syllabi.

## Testing Procedures

- **Course exams can be taken any time during a student's testing window**

For all Huebner School programs except WMCP™ (see below), the testing window begins the day you enroll in a course and ends on the last day of the fourth month after your month of enrollment. For example, if you enroll on May 20, you have the remainder of May, and all of June, July, August, and September to take your exam.

- **Exams for courses in the Huebner School must be taken at a Pearson VUE testing center unless the professor has specifically indicated otherwise**

Pearson VUE operates thousands of testing centers worldwide. Upon enrollment, you will receive an Examination On Demand<sup>®</sup> (EOD<sup>®</sup>) email, which is used for scheduling your exam at the Pearson VUE testing center of your choice. The College advises you to schedule your exam as soon as you receive your EOD email to avoid the last minute rush and to establish a target date for completing the course. The course exam must be taken within your assigned testing window.

- **To schedule your exam, contact a Pearson VUE testing center by visiting [www.vue.com/tac](http://www.vue.com/tac) or calling 866-392-6822**

Pearson VUE will provide a list of testing centers in your area, as well as available testing dates and times. Once you have scheduled an exam, Pearson VUE will send you a confirmation email that lists the scheduled date and time of your exam, directions to the testing center location, and contact information in case you need to reschedule. **Please follow this link** for more detailed information about Pearson VUE testing centers.

If necessary, you may reschedule your exam at no cost as long as the reschedule date is within your testing window. To do so, contact Pearson VUE directly.

- **Be sure to read the testing procedures and policies before you go to the exam**

Pearson VUE holds very tightly to their stated testing policies and procedures, including what they will accept for positive identification to enter the testing center and what you are allowed to bring with you. [Learn more about exam policies here.](#)

- **Students with disabilities are served by the Professional Education Department (PED), which can be contacted at (888) 263-7265. PED is available to assist students, faculty, and College support staff in reaching a joint determination of testing accommodations, where needed.**
- **At the end of the allotted testing time, you will receive a pass/fail notification and a summary of your performance by unit or chapter**

The College will e-mail an official grade report to you within 10 days after you have taken the exam.

- **If you cannot test within your scheduled exam window, contact a Professional Education counselor at 888-263-7265 when you are ready to schedule a new testing window**

There is a \$125 fee to reschedule a testing window, which will be the same length as the original testing window.

- **If you are unsuccessful in your exam attempt, you may retake the exam for a fee of \$125**

To retake a course exam, contact a Professional Education counselor at 888-263-7265. You must wait at least two business days after taking your original exam to schedule a retake.

### **WMCP™ Testing Procedures**

- **The WMCP™ exam can be taken any time during a student's program window, after completion of required coursework**

The WMCP™ program window begins the day you enroll in the program and ends on the last day of the twelfth month after your initial month of enrollment. For example, if you enroll on May 20, you have the remainder of May plus the next 12 months through the end of the following May to take your exam. All course requirements must be successfully completed before you can take the exam.

- **The exam for the WMCP™ program must be taken at a Pearson VUE testing center**

Pearson VUE operates thousands of testing centers worldwide. See above for information about testing at a Pearson VUE center.

- **Students in the WMCP™ program are given up to three (3) exam attempts at no additional cost during the program window. Students may make additional attempts during the program window at a cost of \$250 per additional exam attempt.**

A student's program window can be extended for five (5) months *from the original program end date* for an additional cost of \$400. A program window extension includes one (1) additional exam attempt. Students have a maximum of 18 months to complete the WMCP™ program.

## **Grade Appeals**

If a student feels that the grade awarded for a course does not accurately reflect his or her performance, the student should contact the professor responsible for the course. The professor will review the student's score on the course exam and any other applicable assignments and respond to the student's appeal.

If the appeal is not resolved to the student's satisfaction, he or she may request review by the Associate Dean of Academic Affairs by contacting the Academic Department Office at 610-526-1329. The Associate Dean will review the matter and make a determination as to the validity of the appeal. If, after receiving the Associate Dean's response, a student still feels his or her grade has not been fairly assigned, the student may appeal to the Chief Academic Officer (CAO). The CAO's decisions are final and are not subject to further appeal.

## **CONTINUING EDUCATION (CE) CREDITS**

Many Huebner School courses are eligible to satisfy state insurance CE credit requirements, which vary by state. Please refer to the **CE Grids by Program** on the [Continuing Education](#) section of the web site to determine how many CE credits each course is worth in your home state.

- **If you want CE credit for your coursework, you must request at the time of enrollment that CE be reported to your home state**

Many states have deadlines for reporting CE that are based on the student's examination date. If you request CE after taking the course examination, The College is not responsible if CE is not awarded by your state. If you have not already requested that CE be reported for a course you are taking, contact a Professional Education counselor at **888-263-7265**.

- **For states that require proctor affidavit forms, students are responsible for seeing that the affidavit forms are completed by staff at the Pearson VUE centers when they take their exam**

It is your responsibility as a license-holder to know your state's CE requirements and procedures. Visit the Department of Insurance website for your state to obtain this information. If you have any questions regarding CE reporting, contact a Professional Education counselor at **888-263-7265**.

- **If CE reporting is requested during enrollment, applicable filing fees will be paid by The College**

Late processing fees charged by states for CE requests made after enrollment are the responsibility of the student.

- **If CE is requested during enrollment, credits will be reported within two weeks of the date of the exam**



# **REFUND POLICIES FOR HUEBNER SCHOOL COURSES**

## **Refund Policy for Pre-Paid Designation Packages (including WMCP)**

For pre-paid packages, The College will refund the full tuition paid less a \$495 cancellation fee if a student requests the refund within thirty (30) days of the initial course enrollment. After thirty (30) days, there is no refund.

## **Refund Policy for HS self-study courses**

The College will refund course tuition less a **\$170 cancellation fee** if a student requests the refund within thirty (30) days of the date of enrollment. After thirty (30) days, there is no refund.

## **Refund Policy for 4-week webinar courses**

The College will refund course tuition less a **\$170 cancellation fee** if a student requests the refund no later than thirteen (13) days after the class start date. After thirteen (13) days, there is no refund.

## **Refund Policy for 8-week and 10-week webinar courses**

The College will refund course tuition less a **\$170 cancellation fee** if a student requests the refund no later than thirty (30) days after the class start date. After thirty (30) days, there is no refund.

## **Refund Policy for HS special webinar courses (e.g. HS 333)**

The College will refund course tuition less a **\$170 cancellation fee** if a student requests the refund no later than seven (7) days after the class start date. After seven (7) days, there is no refund.

## **Refund Policy for IRP courses**

The College will refund course tuition less a **\$170 cancellation fee** if a student requests the refund no later than two (2) days before the IRP live review start date.

## **Refund Policy for CLF Capstone Residency course**

The College will refund course tuition less a **\$170 cancellation fee** if a student requests the refund no later than two (2) days before the residency class start date.

## **How to Request a Refund**

All requests for refunds must be made in writing to the Office of Professional Education, The American College of Financial Services, 270 S. Bryn Mawr Ave., Bryn Mawr, PA 19010 or by calling our Professional Education Department at 888-263-7265.

# COLLEGE POLICIES

The following college-wide Student Affairs Policies apply to all students undertaking studies or training through programs of The American College of Financial Services. **Below is a brief description of each policy with a link to the full policy.** Students are responsible to know and abide by these policies.

- Academic Integrity Policy
- Policy on Satisfactory Student Progress
- Credit Hour Policy
- Accommodations for Students with Disabilities
- Student Grievance Policy
- Privacy Policy
- Campus Security Reporting Policy
- Student Sexual Misconduct and Harassment Policy

## 1. Academic Integrity Policy

Academic integrity means that students must demonstrate honest scholarship in all academic activities associated with The College. All academic work submitted for grading, assessment of student proficiency, or consideration as original research must be the result of an individual's own efforts. Academic dishonesty generally falls into one of three categories—cheating, plagiarism, or falsification of information—which are described in The College's policy. [Follow this link to view The College's full \*Academic Integrity Policy\*.](#)

## 2. Policy on Satisfactory Student Progress

Satisfactory academic progress is governed by two principles: The College's Limit on Repeating Failed Courses and the 5-Year Rule for expiration of completed courses if the designation program they are part of is not completed. [Follow this link to view The College's full \*Policy on Satisfactory Academic Progress\*.](#)

## 3. Credit Hour Policy

Graduate and Huebner school courses are transferrable as 3-credit courses to other institutions of higher education. The Credit Hour Policy describes how The College ensures that Graduate and Huebner courses meet credit hour standards. [Follow this link to view The College's full \*Credit Hour Policy\*.](#)

#### **4. Accommodations for Students with Disabilities**

Students with disabilities are served by the Professional Education Department (PED), which can be contacted at (888) 263-7265. PED is available to assist students, faculty, and College support staff in reaching a joint determination of academic accommodations for students with verifiable disabilities, where appropriate. [Follow this link to view The College's full policy on \*Accommodations for Students with Disabilities\*.](#)

#### **5. Student Grievance Policy**

The College has a process for addressing unresolved student grievances, but requests that students do the following before submitting a grievance:

- 1) Review the Student Handbook to ensure they understand applicable College policy;
- 2) Contact the Professional Education Department (PED) at (888) 263-7265 to attempt to resolve potential issues.

[Follow this link to view the \*Student Grievance Policy\*.](#)

#### **6. Privacy Policy**

The College's Privacy Policy describes rights of access to information contained in student records and the circumstances under which student information may be released. The American College does not receive funding under any program administered by the U.S. Department of Education, and consequently, is not bound by the requirements of the Family Education Rights and Privacy Act (FERPA). [Follow this link to view The College's full \*Privacy Policy\*.](#)

#### **7. Campus Security Reporting Policy**

The American College is committed to creating and maintaining a safe and positive environment for all of our students, faculty, employees and visitors to the campus. Individuals are urged to report any incidents they believe potentially endanger the safety or security of any persons on campus. [Follow this link to view the full \*Campus Security Reporting Policy\*.](#)

#### **8. Student Sexual Misconduct and Harassment Policy**

It is the policy of The American College, in working to establish an environment of respect that is conducive to learning for every student, to view sexual misconduct and sexual harassment of students as unacceptable conduct that will not be tolerated. This policy includes all forms of sexual misconduct, sexual harassment, sexual assault, relationship violence, and sexual violence by students, faculty, employees, or third parties while engaged in College activities. [Follow this link to view the full \*Student Sexual Misconduct and Harassment Policy\*.](#)

## **GENERAL CONTACT INFORMATION**

**Course Enrollment and Academic Advisement:** Professional Education Department  
888-263-7265 or [ProfessionalEducation@TheAmericanCollege.edu](mailto:ProfessionalEducation@TheAmericanCollege.edu)

**General Questions:** Professional Education Department (same as above)

Technology Support

- Questions Related to Blackboard: [Blackboard@TheAmericanCollege.edu](mailto:Blackboard@TheAmericanCollege.edu)
- Questions Related to Mobile Devices: [Mobilesupport@TheAmericanCollege.edu](mailto:Mobilesupport@TheAmericanCollege.edu)
- Questions Related to Webinar Courses: [Onlinedelivery@TheAmericanCollege.edu](mailto:Onlinedelivery@TheAmericanCollege.edu)

**Academic Department and Dean's Office: 610-526-1329**

**Intensive Review Program:** [IRP@TheAmericanCollege.edu](mailto:IRP@TheAmericanCollege.edu)

**Library Resources:** [Library@TheAmericanCollege.edu](mailto:Library@TheAmericanCollege.edu) or 610-526-1307

**Professional Recertification (formerly PACE):** Professional Recertification Program  
610-526-1487

**Office of the Registrar:** [Registrar@TheAmericanCollege.edu](mailto:Registrar@TheAmericanCollege.edu)