



THE  
**AMERICAN  
COLLEGE**  
OF FINANCIAL SERVICES®

**AGREEMENT FOR TRANSFER OF CREDIT(S) BETWEEN THE AMERICAN  
COLLEGE OF FINANCIAL SERVICES AND BANKER'S LIFE**

**EFFECTIVE CALENDAR YEAR 2021-2022 (Renewed Annually)**

\_\_\_\_\_  
Chad Patrizi, Ph.D.  
Provost

\_\_\_\_\_  
5/17/2021  
Date

\_\_\_\_\_  
Scott Gustavson, CLF  
Sr. Director, Learning Strategy

\_\_\_\_\_  
5/20/2021  
Date

\_\_\_\_\_  
KC Irwin, Ph.D.  
Associate Provost for Academics

\_\_\_\_\_  
5/17/2021  
Date

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Wayne Pugh  
Management & Leadership  
Development Program Manager

\_\_\_\_\_  
5/20/2021  
Date



## Transfer Agreement

This particular transfer of credit articulation agreement will partner the Banker's Life Training Course and The American College's HS 384 Strategic Leadership course, satisfying the requirements for both the CLF® designation's Office and Field tracks.

The credit transfer policy for Huebner School courses permits a student who completed comparable courses at a domestically accredited college or university, financial entity, or in The American College's Irwin Graduate School, to apply for transfers of credit into certain Huebner School programs.

The American College's Transfer Requirement(s):	
The student must have completed the comparable course(s) within seven (7) years prior to the date of this application. Any course completed more than seven (7) years prior to the date of this application is ineligible for transfer of credit.	The student will earn a grade of "C" or better in each course requested for transfer.
The student must be matriculated with The American College of Financial Services in order to apply for transfer of credit.	The student must provide the Registrar at The American College of Financial Services with a syllabus and sealed copy of the student's official transcripts verifying completion of the comparable course(s), the student wants to transfer for credit. The official and complete transcript must be sent directly from the transfer institution to The American College.

Bankers Life Training Course(s)	The American College (TAC) Equivalent
BSM Essentials	HS 384 Strategic Leadership

Banker's Life Training Course Objective(s)	TAC HS 384 Course Objective(s)
Objective 1: Vision Statement Mission SWOT Analysis Goal Planning Process	Objective 1: Explain the elements of effective strategic planning



Objective 2: Leadership Sales & Production Metrics Operational Systems Results Priority Management Time Management	Objective 2: Execute organizational objectives and priorities
Course Objective 3: SWOT Analysis Human Resources Culture	Course Objective 3: Analyze the organization, industry, and global environment
Course Objective 4: Goal Planning Process Differentiation	Course Objective 4: Evaluate alternative goals, objectives, and plans
Course Objective 5: Vision Statement Mission SWOT Analysis Core Values Strategic Thinking	Course Objective 5: Create a strategic plan that enhances company performance
Course Objective 6: Business Plan Spreadsheet Agent Metrics Follow-Up Motivation Tracking Systems	Course Objective 6: Assess progress and adjust activities to maintain alignment

Final Outcome of Banker's Life Training Course:

Three (3) credit hours of transferrable work which will satisfy the content requirement for HS 384 at The American College.

Disclaimer: This articulation agreement is submit for annual review and renewal.